



Salesforce Case Studies

INDUSTRY : Manufacturing

- Clients :-

- Celotex
- Rexam
- Semtech
- PSE

Celotex

- **Customer Industry:** Building and Construction
- **Customer summary:** Celotex is the UK brand leader of thermal insulation solution for the building and construction markets.
- **Services Provided:**
 - Salesforce.com Implementation
 - Sales and Marketing Alignment
 - Strategic Change Management consulting
 - Salesforce Service Cloud
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.

Challenges:

- The Celotex organization was challenged with many disparate teams as well as large volumes of existing customer data in multiple systems.
- They sought to drive new levels of efficiency and better sales results by upgrading their sales, customer service, and marketing platforms from the old CRM system to Salesforce.com – a single platform with streamlined processes which could store and manage all customer data as well as integrate with their other existing digital fulfillment and access control applications.



Celotex

- **Customer Industry:** Building and Construction
- **Customer summary:** Celotex is the UK brand leader of thermal insulation solution for the building and construction markets.
- **Services Provided:**
 - Salesforce.com Implementation
 - Sales and Marketing Alignment
 - Strategic Change Management consulting
 - Salesforce Service Cloud
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.

Solutions:

- OSI helped Celotex perform an initial implementation of Salesforce and Service Cloud on a small set of users with basic functionality in about three months. Subsequent releases over the course of a year were used to add users and functionality.
- OSI provided solution in three modules:
 - Sales:** Custom functionality centered on inquiries and projects, with drop down lists to break down information by territories or account manager. Tracking of product delivery dates provides reliable forecasting of monthly run rates.
 - Marketing:** The ability to email contacts directly from Salesforce using templates or custom text, and to forward emails from Outlook into Salesforce for storage as part of an account. The ability to make collateral requests via Salesforce, automating the process from start to finish.
 - Lead tracking and nurturing:** Custom developed fields capture information provided by potential customers through forms on the Celotex website, including a proprietary calculator application specific to the insulation/building industries.

Further customizations map the captured calculator data from an inquiry when a lead becomes a customer. Account Managers can select the appropriate products for each customer using this captured information.



Celotex

- **Customer Industry:** Building and Construction
- **Customer summary:** Celotex is the UK brand leader of thermal insulation solution for the building and construction markets.
- **Services Provided:**
 - Salesforce.com Implementation
 - Sales and Marketing Alignment
 - Strategic Change Management consulting
 - Salesforce Service Cloud
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.

Results:

- Improved case management.
- Integrated database of customer, distributor and supplier details.
- Better processing of customer, distributor and supplier emails.
- Enhanced analytics and strategic planning via custom reports and dashboards



Rexam

- **Customer Industry:**
Manufacturing
- **Customer summary:** Rexam is into manufacturing of Can beverages in US ,having 14 can plants and 2 end plants
- **Services Provided:**
Salesforce.com
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.
- **Relationship Owner/SME:**
Nitin Patel/Siddharth Jain

Challenges:

- Rexam needed a way to manage complaint statuses at different stages and also should be able to add comments without needing to separately adding complaint comments.
- As a business process it is required that a QAR or Complaint Actions can only be created once a complaint has crossed certain stages and all the necessary information required has been captured
- Rexam wanted to notify the users about the new Complaint Actions been logged so that "Assigned To" user can navigate to page and submit their comments.



Rexam

- **Customer Industry:**
Manufacturing
- **Customer summary:** Rexam is into manufacturing of Can beverages in US ,having 14 can plants and 2 end plants
- **Services Provided:**
Salesforce.com
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.
- **Relationship Owner/SME:**
Nitin Patel/Siddharth Jain

Solutions:

- Configured features of Salesforce.com using Roles, Profiles, Organisation Wide Settings, Sharing Rules, Field Creation, Validation rules, Workflows, Reports Dashboards , Email Templates and customization of standard Object and creation of Custom Objects.
- Creation of VF page so as to cater a general complaint details page requested for a complaint form. It allowed to add comments by the user , without needing to navigate to standard complaint section.
- Sending mails to the different levels of user based on the role hierarchies described in salesforce through, triggers or Workflows etc.
- Rexam wanted deletion of attachments to the complaints , hence apex trigger has been added to only the attachment owner and administrators, thus providing the deletion rights to the different profiles.
- Triggers and other customization were done for REXAM like complaints raised for particular plant for particular location, Prefill case details etc.



Rexam

- **Customer Industry:**
Manufacturing
- **Customer summary:** Rexam is into manufacturing of Can beverages in US ,having 14 can plants and 2 end plants
- **Services Provided:**
Salesforce.com
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.
- **Relationship Owner/SME:**
Nitin Patel/Siddharth Jain

Results:

- Increased collaboration among the users of Rexam.
- Fast responsive system against the complaints raised buy the Rexam user.
- Increased Customer participation and their satisfaction.



Semtech Corporation – LoRa

- **Customer Industry:** Electronics Technology
- **Customer summary:** Semtech Corporation is a supplier of analog and mixed-signal semiconductors.
- **OSI Practice engaged:** Salesforce.com
- **Services Provided:**
 - Salesforce.com communities design, development, training and
 - Consultancy around best practices
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.
- **Technologies used:** Salesforce.com communities
- **Relationship Owner/SME:** Kanishk Prasad / Sanchit Singhal

Challenges:

- With a vast and growing Product range and ever growing network of Partners and Customers it was looking at ways to increase collaboration and provide customers and partners with a one stop shop for gathering any Product information via Articles, User Guides, FAQs etc , share ideas, creation of cases and share the complete Product Catalog.
- Flexibility, Agility and Durability of the solution using Salesforce as a Platform.
- Customized UI to match Semtech's existing branding but using Salesforce standard community functionality behind the scenes to prevent development effort and using Salesforce philosophy of clicks rather than code.



Semtech Corporation – LoRa

- **Customer Industry:** Electronics Technology
- **Customer summary:** Semtech Corporation is a supplier of analog and mixed-signal semiconductors.
- **OSI Practice engaged:** Salesforce.com
- **Services Provided:**
 - Salesforce.com communities design, development, training and
 - Consultancy around best practices
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.
- **Technologies used:** Salesforce.com communities
- **Relationship Owner/SME:** Kanishk Prasad / Sanchit Singhal

Solutions:

- LoRa customer community was developed as a part of solution – for Lora Product range (Authenticated)
- Used Salesforce standard community features – Chatter Answer Zones, Idea Zones, Knowledge, Chatter and Data Categories – all Configuration based – very easy and fast to add/change/remove information .
- Integration of approval processes for new user requests directed to moderators of communities to prevent Bad/Duplicate Data.
- Custom screens for Partner Product listings – enabling partners to add products , product logos and other product information.
- Case creation for unanswered questions or unfound information.



Semtech Corporation – LoRa

Solutions:

- **Customer Industry:** Electronics Technology
- **Customer summary:** Semtech Corporation is a supplier of analog and mixed-signal semiconductors.
- **OSI Practice engaged:** salesforce.com
- **Services Provided:**
 - Salesforce.com communities design, development, training and
 - Consultancy around best practices
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.
- **Technologies used:** Salesforce.com communities
- **Relationship Owner/SME:** Kanishk Prasad / Sanchit Singhal

- Single sign on between users of Lora community and Semtech Support public community by using automatic Permission set assignments.
- Completely custom UI based on deep usage of JQuery and HTML 5/CSS 3 features.

- Few of the visual flows as a part of Semtech Solution:

- Registration Process:

<https://whatfix.com/#!/flows/case-study/f4a0c730-0c60-11e6-920b-448a5b5dd5b8/>

- MyProfile URL :

<https://whatfix.com/#!/flows/case-study-for-myprofile-details/149e7150-0c6f-11e6-874c-448a5b5dd1ba/>

- Business flow:

<http://whatfix.com/#!/flows/-/ad411e30-06fc-11e6-a93d-448a5b5dd5b8/>



Semtech Corporation – LoRa

- **Customer Industry:** Electronics Technology
- **Customer summary:** Semtech Corporation is a supplier of analog and mixed-signal semiconductors.
- **OSI Practice engaged:** salesforce.com
- **Services Provided:**
 - Salesforce.com communities design, development, training and
 - Consultancy around best practices
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.
- **Technologies used:** Salesforce.com communities
- **Relationship Owner/SME:** Kanishk Prasad / Sanchit Singhal

Results:

- Increased collaboration amongst Partners and Customers.
- One stop shop for all customer queries– Knowledge Articles, User Guides, FAQs, Application Notes categorized by Data categories for easy search, case creation.
- Helped Monitoring of all User Questions and Replies by Moderators closely to see what customers are looking for and what is trending which helped in company's future outlook.
- Increased Partner participation and customer satisfaction



Semtech Corporation - Public

- **Customer Industry:** Electronics Technology
- **Customer summary:** Semtech Corporation is a supplier of analog and mixed-signal semiconductors.
- **OSI Practice engaged:** salesforce.com
- **Services Provided:**
 - Salesforce.com communities design, development, training and
 - Consultancy around best practices
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.
- **Technologies used:** Salesforce.com communities
- **Relationship Owner/SME:** Kanishk Prasad / Sanchit Singhal

Challenges:

- Semtech corporation needed a customer community which can provide unauthenticated public access to their public knowledge base to general audience and at the same also provide authenticated access for their registered customers and help them collaborate and get access to any Product information via Articles, User Guides, FAQs etc .
- Flexibility, Agility and Durability of the solution using Salesforce as a Platform.
- Managing customer community licenses in such a way that costs could be minimized.
- Customized UI to match Semtech's existing branding but using Salesforce standard community functionality behind the scenes to prevent development effort and using Salesforce philosophy of clicks rather than code.



Semtech Corporation - Public

- **Customer Industry:** Electronics Technology
- **Customer summary:** Semtech Corporation is a supplier of analog and mixed-signal semiconductors.
- **OSI Practice engaged:** Salesforce.com
- **Services Provided:**
 - Salesforce.com communities design, development, training and
 - Consultancy around best practices
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.
- **Technologies used:** Salesforce.com communities
- **Relationship Owner/SME:** Kanishk Prasad / Sanchit Singhal

Solutions:

- Semtech public community was developed as a part of solution – for different business units within Semtech like Broadcast Video, Power Management, Circuit Protection and Security / Surveillance (Public View/ Authenticated Posts)
- Used Salesforce standard community features – Chatter Answer Zones, Knowledge, Chatter and Data Categories – all Configuration based – very easy and fast to add/change/remove information .
- Integration of approval processes for new user requests directed to moderators of communities to prevent Bad/Duplicate Data.



Semtech Corporation - Public

Solutions:

- **Customer Industry:** Electronics Technology
 - **Customer summary:** Semtech Corporation is a supplier of analog and mixed-signal semiconductors.
 - **OSI Practice engaged:** salesforce.com
 - **Services Provided:**
 - Salesforce.com communities design, development, training and
 - Consultancy around best practices
 - **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.
 - **Technologies used:** Salesforce.com communities
 - **Relationship Owner/SME:** Kanishk Prasad / Sanchit Singhal
- Single sign on between users of Semtech public community and Lora community by using automatic Permission set assignments.
 - Management of license costs by using a custom deactivation/activation of inactive users to save license costs.
 - Completely custom UI based on deep usage of JQuery and HTML 5/CSS 3 features.



Semtech Corporation - Public

- **Customer Industry:** Electronics Technology
- **Customer summary:** Semtech Corporation is a supplier of analog and mixed-signal semiconductors.
- **OSI Practice engaged:** salesforce.com
- **Services Provided:**
 - Salesforce.com communities design, development, training and
 - Consultancy around best practices
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.
- **Technologies used:** Salesforce.com communities
- **Relationship Owner/SME:** Kanishk Prasad / Sanchit Singhal

Results:

- Increased collaboration amongst Semtech Customers.
- One stop shop for all customer queries– Knowledge Articles, User Guides, FAQs, Application Notes categorized by Data categories for easy search.
- Helped Monitoring of all User Questions and Replies by Moderators closely to see what customers are looking for and what is trending which helped in company's future outlook.
- Increased customer satisfaction.



PSE Power

- **Customer Industry: Power Management Solution**
- **Customer summary:** PSE is a leading supplier of power protection and energy management solutions to multinational blue chip clients throughout Ireland
- **OSI Practice engaged:** Salesforce.com , ServiceMax
- **Services Provided:**
 - Servicemax customization
 - Salesforce customization
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.
- **Technologies used:** Salesforce.com, Servicemax
- **Relationship Owner/SME:** Anupam Bansal

Challenges:

- Field Service Engineers used to build a huge checklist which was dependent on equipment installed and the response received, thus involved huge paperwork / had a bulk and slow process just to capture data. There was no out of the box feature / apps available for the scenario .
- There were no tool for automatic preventative maintenance and service alerts. Thus the business was dependant on someone checking calendars or manually building calendars.
- The old Work Order system was not efficient.
- Out of the box Servicemax SFMs on iPad were not UI friendly.



PSE Power

- **Customer Industry: Power Management Solution**
- **Customer summary:** PSE is a leading supplier of power protection and energy management solutions to multinational blue chip clients throughout Ireland
- **OSI Practice engaged:** Salesforce.com , ServiceMax
- **Services Provided:**
 - Servicemax customization
 - Salesforce customization
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.
- **Technologies used:** Salesforce.com, Servicemax
- **Relationship Owner/SME:** Anupam Bansal

Solution:

- Built a custom object / metadata model for the equipment checklist which needs data entry only once. After that the system automatically picks up the required checklist / question and presents on ipad / machine .
- Automation of checklist report creation with relevant information which results in optimum use of page / paper (if printed).
- Preventive Maintenance plan was customized (out of box Servicemax PM plans had some limitation) based on requirements to generate plans with proper alerts and automatically build future plans based on contracts
- Contract Renewal was also automated to cater to multi-year renewals and removed the need for a person to manually click the renew button. This helped in automation of appropriate preventive work order creation
- iPad SFM UI logic was altered (not out of box) to give a better look and feel and ease of use
- Output Documents were dynamically generated based on the equipment and didn't require need to create separate output document / equipment.



PSE Power

- **Customer Industry: Power Management Solution**
- **Customer summary:** PSE is a leading supplier of power protection and energy management solutions to multinational blue chip clients throughout Ireland
- **OSI Practice engaged:** Salesforce.com , ServiceMax
- **Services Provided:**
 - Servicemax customization
 - Salesforce customization
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.
- **Technologies used:** Salesforce.com, Servicemax
- **Relationship Owner/SME:** Anupam Bansal

Results:

- New type of generator / equipment could be easily available in the system with checklist without the need for any code change.
- Efficiency of technician increased by 80-90%
- Phase 2 work is in discussion
- Quickbooks integration with salesforce is planned for the next phase



Industry: Media and Internet Service Providers

- Clients :-

- SuddenLink
- Spectrum Reach
- DIRECTV
- Intercall
- Telus
- TimeInc –Communities
- Newsday



SuddenLink

- **Customer Industry:** ISP
- **Customer summary:** SDL is leading provider of Internet cable broadband in USA.
- **OSI Practice engaged:** salesforce.com
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.
- **Technologies used:** Salesforce.com communities
Dataloader for Migration
- **Relationship Owner/SME:** Beth Rivelli/Siddharth Jain

Challenges:

- With a vast and growing Business and ever growing technology SDL pitched in Salesforce so that user have one system, user-friendly and on demand system which can be accessible from anywhere .
- With SOMS as a current system it was difficult to manage customer accounts ,Contacts, Broadband connection processes like New Orders, Transfer orders, Upgrades ,Disconnection requests based on the demands of the customers.
- To keep the simple user interface for Aggregators (Dealers/Non SDL customers)but improved over Current SOMS.
- Standard functionality as much as possible, with some custom development, when required to meet the other requirements.



SuddenLink

- **Customer Industry:** ISP
- **Customer summary:** SDL is leading provider of Internet cable broadband in USA.
- **OSI Practice engaged:** salesforce.com
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.
- **Technologies used:** Salesforce.com communities
DataLoader for Migration
- **Relationship Owner/SME:** Beth Rivelli/Siddharth Jain

Solutions:

- Configured features of Salesforce.com using Roles, Profiles, sharing setting , OWDsettings, Field Creation, Validation rules, Workflows, Reports Dashboards , Email Templates and customization of standard Object and creation of Custom Objects.
- Implementation of Communities in salesforce to cater services for the Aggregators and maintain the orders for the end users.
- Creation of Apex VF pages so that user can check the service areas of Suddenlink and put the New Orders,Transfer, Upgrade, Disconnect requests.
- Different VF pages contained different information in the community console and all linked to cater needs to the customer and business flow.
- Sending mails to the customer for their orders confirmations thru workflows , triggers etc thus providing alerts on timely manner to stakeholders.
- Data Migration from SOMS/ICOMS to Salesforce.



SuddenLink

- **Customer Industry:** ISP
- **Customer summary:** SDL is leading provider of Internet cable broadband in USA.
- **OSI Practice engaged:** salesforce.com
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.
- **Technologies used:** Salesforce.com communities
Dataloader for Migration
- **Relationship Owner/SME:** Beth Rivelli/Siddharth Jain

Results:

- Increased collaboration amongst Aggregators and end users.
- One stop shop for all customer queries– thru Communities. Aggregator could login and check for the order anywhere thru internet and cater services to end-users.
- Increased Customer participation and their satisfaction.
- Product Supporting and Reporting Became easier.



Spectrum Reach

- **Customer Industry: Media**
- **Customer summary:**
Spectrum Reach
- **OSI Practice engaged:**
Salesforce.com
- **Services Provided:**
 - Integration with third party tools like Eclipse, STRATA TIM
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.
- **Relationship Owner/SME:**
Beth Rivelli/Sanchit Singhal

Challenges:

- As a Business Demand and to maintain stability with the competitors, Charter Media engaged OSI to implement an integrated broadcast media salesforce automation in salesforce.com to increase the sales productivity, visibility ,awareness.
- Wanting of a single system(Capable to integrate with their legacy system STRATA TIM) which is available on demand and helping Account executives to get the proposal details through the integrated view with salesforce.
- Tracking of individual and team sales performance with integrated billed actuals from Eclipse



Spectrum Reach

- **Customer Industry: Media**
- **Customer summary:**
Spectrum Reach
- **OSI Practice engaged:**
Salesforce.com
- **Services Provided:**
 - Integration with third party tools like Eclipse, STRATA TIM
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.
- **Relationship Owner/SME:**
Beth Rivelli/Sanchit Singhal

Solutions:

- Configured features of Salesforce.com using Roles, Profiles, Organization Wide Settings, Sharing Rules, Field Creation, Validation rules, Reports Dashboards, customization of standard Object and creation of Custom Objects.
- Tracking of individual and team sales performance with integrated billed actuals using different salesforce reports and VF pages capturing data from different junctions objects and providing a matrix structure to get the details of every Account Executives, Regions , Departments plus Forecasting details of every proposals and Budgets allocated to every Account Executives.
- Implementation of the third party integration TIM System view within salesforce. This would help the Account Executives to Create proposals in salesforce itself. Used Informatica On Cloud to keep the three systems in sync STRATA TIM and Eclipse Salesforce .
- Sending mails to the different levels of Executives based on the role hierarchies described in salesforce and their approvals/rejections thru, triggers or Workflows etc.



Spectrum Reach

- **Customer Industry: Media**
- **Customer summary:**
Spectrum Reach
- **OSI Practice engaged:**
Salesforce.com
- **Services Provided:**
 - Integration with third party tools like Eclipse, STRATA TIM
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.
- **Relationship Owner/SME:**
Beth Rivelli/Sanchit Singhal

Solutions:

- Below are the URLs for a visual reference:
 - Tim Creation through Salesforce

<https://whatfix.com/#!flows/create-tim-proposal-from-salesforce-on-opportunity/14b98b10-168e-11e6-94b2-448a5b5dd1ba/>

- Forecast Matrix

<https://whatfix.com/#!flows/forecast-matrix-this-matrix-helped-spectrum-to-see-the-data-in-one-go-for-budget-accountrevenue/7aa3ffc0-12a9-11e6-aa0e-448a5b5dd5b8/>



Spectrum Reach

- **Customer Industry: Media**
- **Customer summary:**
Spectrum Reach
- **OSI Practice engaged:**
Salesforce.com
- **Services Provided:**
 - Integration with third party tools like Eclipse, STRATA TIM
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.
- **Relationship Owner/SME:**
Beth Rivelli/Sanchit Singhal

Results:

- Increased collaboration among the Account Executives and hence increase in sales.
- One stop shop for all AE queries– thru different matrix, forecast matrix, Budget Matrix, AE matrix etc, reports and dashboards.
- Increased Customer participation and their satisfaction.
- Increase in team sales performance and getting more business.



DirecTV

- **Customer Industry:** Media
- **Customer summary** DIRECTV is one of the world's leading providers of digital television entertainment services
- **OSI Practice engaged:** salesforce.com /Informatica Cloud
- **Services Provided:**
 - Salesforce sustainment
 - Application maintenance and support
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.

Challenges:

- DirecTV wanted to deliver an improved and more consistent customer experience by transitioning their outsourced Call Centers to a modern Cloudbased system with standardized scripting .
- By implementing Salesforce for both their Residential and Commercial business lines, DirecTV also met another requirement to use analytics to measure and continually improve team performance across the systems



DirecTV

- **Customer Industry:** Media
- **Customer summary** DIRECTV is one of the world's leading providers of digital television entertainment services
- **OSI Practice engaged:** salesforce.com /Informatica Cloud
- **Services Provided:**
 - Salesforce sustainment
 - Application maintenance and support
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.

Solution:

- OSI helped DirecTV achieve a fast and smooth transition from their legacy system to Salesforce.com for managing call centers.
- With its quick speed-to-market sustainment program coupled with cost effective, quality solutions, OSI helped DirecTV achieve a smooth transition from their legacy system to Salesforce.com for managing call centers.
- OSI implemented DirecTV's Salesforce solution and then provided additional sustainment services for the administration, support, maintenance and enhancement of Salesforce and other systems including Informatica Cloud for third party integrations.
- Some Custom Java Apps for data integration were also built.



DirecTV

- **Customer Industry:** Media
- **Customer summary** DIRECTV is one of the world's leading providers of digital television entertainment services
- **OSI Practice engaged:** salesforce.com /Informatica Cloud
- **Services Provided:**
 - Salesforce sustainment
 - Application maintenance and support
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.

Results:

- With the Cloud solution and continuous application support provided by OSI, DirecTV was able to successfully achieve its desired goals for transitioning to a modern Cloud-based system to support their Call Centers One stop shop for all customer queries– thru Service Cloud Console and CTI integration of five9
- Overall the solution helped DirecTV resolve user queries faster while lowering the cost of resources needed to achieve Service Level Agreements.



InterCall

- **Customer Industry: Media**
Audio –Video Business Conferencing Sol.
- **Customer summary :**
InterCall, a subsidiary of West Corporation. is the world leader in audio, web and video conferencing solutions for business communications and collaboration.
- **OSI Practice engaged:**
salesforce.com /Informatica Cloud
- **Services Provided:**
 - Salesforce sustainment
 - Application maintenance and support
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.

Challenges:

- InterCall had previously launched Salesforce in their organization but wanted to provide their internal IT team with additional support for maintaining the system and managing support tickets.
- Because OSI had provided considerable consulting and technology services to InterCall in the past, they turned to OSI again to engage a five-member production line support team who would help manage certain Salesforce cases.



InterCall

- **Customer Industry: Media**
Audio –Video Business Conferencing Sol.
- **Customer summary:**
InterCall, a subsidiary of West Corporation. is the world leader in audio, web and video conferencing solutions for business communications and collaboration.
- **OSI Practice engaged:**
salesforce.com /Informatica Cloud
- **Services Provided:**
 - Salesforce sustainment
 - Application maintenance and support
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.

Solution:

- OSI helped InterCall support their instance of Salesforce.com and Informatica Cloud for third party integrations using a five-person consultant team located in Delhi -India.
- Three teams were aligned to different Lines of Business and to different Geographical regions – one team supporting the U.S. and two teams supporting France.
- The program, initially designed to run for a limited time, was extended several more months. OSI teams were regarded as extended development teams for their respective counterparts at InterCall.



InterCall

- **Customer Industry: Media**
Audio –Video Business Conferencing Sol.
- **Customer summary:**
InterCall, a subsidiary of West Corporation. is the world leader in audio, web and video conferencing solutions for business communications and collaboration.
- **OSI Practice engaged:**
salesforce.com /Informatica Cloud
- **Services Provided:**
 - Salesforce sustainment
 - Application maintenance and support
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.

Results:

- After the success of OSI's initial production support, InterCall extended the scope of the project to gain OSI's services for far more challenging design and development work.
- As a result of this engagement, three complex business processes for InterCall's varying Lines of Business went live.
- Additionally, InterCall's internal team gained experience in the tasks that OSI came on board to support.



Telus

- **Customer Industry: Tele-communication**
- **Customer summary :** TELUS is a leading national telecommunications company in Canada providing a wide range of products and services including internet, voice, entertainment, television, video, and satellite, as well as healthcare solutions.
- **Services Provided:**
 - Salesforce.com Design & Build
 - Salesforce.com Integration
 - Service Cloud Deployment
 - Genesys CTI Integration
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.

Challenges:

- Although TELUS had implemented salesforce.com 10 years prior, their environment was not optimized for efficiency, productivity or the level of service they hoped to provide their business customers
- They faced the following challenges in their existing environment.
 - Agents had to access multiple applications to retrieve needed information for each service call.
 - Multiple systems and disparate data did not allow for a "Single View of the Customer."
 - It took an average of six months to train customer service agents on multiple systems supporting the service environment.
 - They could not easily or efficiently log all customer activities and interactions.
 - Four critical business units – Wireless, Assurance, Loyalty & Retention and Wire Line – were not able to use the existing salesforce.com platform.



Telus

- **Customer Industry: Telecommunication**
- **Customer summary:** TELUS is a leading national telecommunications company in Canada providing a wide range of products and services including internet, voice, entertainment, television, video, and satellite, as well as healthcare solutions.
- **Services Provided:**
 - Salesforce.com Design & Build
 - Salesforce.com Integration
 - Service Cloud Deployment
 - Genesys CTI Integration
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.

Solution:

- For the first project, OSI deployed the salesforce.com Service Cloud platform for TELUS, providing such features as computer-telephony integration (CTI), case management, entitlement management for service contracts, and a custom user interface using Visualforce.
- During the course of the project, it was critical to not disrupt the functionality of the existing salesforce.com environment for current users. The solution was designed to:
 - Combine multiple systems and their data into one customized application accessible to all critical business units and teams.
 - Integrate the platform with the Genesys CTI Adapter that pushes information to TELUS service agents.
 - Implement the ability to track case and activity history
- The Service Cloud platform was integrated with the Canada Post Address Validation system and TELUS internal web services. OSI partnered with IBM to provide Program Management and Testing services.



Telus

- **Customer Industry: Tele-communication**
- **Customer summary:** TELUS is a leading national telecommunications company in Canada providing a wide range of products and services including internet, voice, entertainment, television, video, and satellite, as well as healthcare solutions.
- **Services Provided:**
 - Salesforce.com Design & Build
 - Salesforce.com Integration
 - Service Cloud Deployment
 - Genesys CTI Integration
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.

Results:

- One million cases were managed in the first 10 months of Service Cloud deployment.
- Calls per customer decreased by 4.9% in the first 6 months of Service Cloud deployment.
- Client Churn has decreased by 17%.
- Client Satisfaction is up 35%.



TimeInc-Communities

- **Customer Industry:** Media
- **Customer summary :** Time Inc. is the UK's leading consumer magazine and digital publisher.
- **Services Provided:**
 - Salesforce.com Design & Build
 - Salesforce Communities
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.

Challenges:

- Time Inc. had been outsourcing their subscription and fulfillment management to a third party vendor using 25-year-old systems. They wished to bring the function in-house to reduce costs, gain centralized control of the process, and become more flexible marketers.
- They faced the following challenges in their existing environment.
 - With their existing system QSS, Registration module for the new user was missing. Also for the existing users sometime the irrelevant records were displayed . Hence breach of security was existing for the subscribed user.
 - Renew Process for Subscription was very clumsy and not user friendly which was asynchronous. It had time consuming process to process renewal of subscription to user.
 - QSS site was very slow which was not plug and play. This was and not responsive and
 - Users had inability to see important key feature related to their subscription like :Edit Payment method, Edit Contact Details, raise support tickets, Add new Payment methods, Claim missed Issue, Suspending the subscriptions Setting preference for communication for the users.
 - Existing system was incapable of handing multiple subscription for a particular user.



TimeInc -Communities

- **Customer Industry:** Media
- **Customer summary:** Time Inc. is the UK's leading consumer magazine and digital publisher.
- **Services Provided:**
 - Salesforce.com Design & Build
 - Salesforce Communities
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.

Solution:

- Communities was implemented as a part of solution for TimeInc.OSI has the used standard features for setting up the community for time Inc.
- Following were the part of the solutions imparted.
 - Well designed Smart Registration process was implanted to New user keeping the security aspect for the Subscribed user. It could handle subscribers uniqueness.
 - Renewal Process got synchronized and communities provided, user interacted system to subscribers. User could see renew options available to them and choose the renewal package as per need.
 - Salesforce Community provided subscribed users a friendly platform that is plug and play and with on demand presence. With the portability of the salesforce Mobile compatibility was also and extra added advantage for the user.
 - Subscribed user got the additional important key feature related to their subscription like :Edit Payment method, Edit Contact Details, raise support tickets, Add new Payment methods, Claim missed Issue, Suspending the subscriptions and setting preference for communication of users.
 - Multiple subscription were handled easily and user could see in his account for what subscription he/she is registered for in a grid.



TimeInc -Communities

- **Customer Industry:** Media

- **Customer summary:** Time Inc. is the UK's leading consumer magazine and digital publisher.

- **Services Provided:**

- Salesforce.com Design & Build
- Salesforce Communities

- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.

Solution:

- Below are the URLs for a visual reference:

- Registration Process:

<https://whatfix.com/#!flows/login/63840540-02ed-11e6-ae01-448a5b5dd5b8/>

- Edit Subscription details for subscribed user:

<https://whatfix.com/#!flows/updation-of-subscription-details-/4386f230-02f1-11e6-9560-448a5b5dd1ba/>

- Top Navigation bar helping user to navigate :

<https://whatfix.com/#!flows/navigation-bar/143a0000-02f4-11e6-9560-448a5b5dd1ba/>



TimeInc -Communities

- **Customer Industry:** Media
- **Customer summary:** Time Inc. is the UK's leading consumer magazine and digital publisher.
- **Services Provided:**
 - Salesforce.com Design & Build
 - Salesforce Communities
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.

Results:

- As a result of the well defined registration process, more user could register and user could easily subscribe.
- Time Inc revived its business by user renewing the subscription thru the implementation of this community
- Client Satisfaction is up 40%.



Newsday, Inc. – Adbase Integration

- **Customer Industry:** Media

- **Customer summary :**
Newsday, Inc. is a print and electronic media company based in New York state, providing services throughout the greater New York area.

- **Services Provided:**

- Salesforce.com Integration, Customization and Configuration.
- Standard Salesforce objects, custom objects and integration to legacy non salesforce Adbase software system.

- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com integrations and past experience with the company Newsday was a return client.

- **Relationship Owner/SME**
Gururaj Havanur/Puneet Khosla

Challenges:

- Newsday, Inc. was spending too much time on double entry from their non SFDC NewsCycle solution to their SFDC Order Processing solution. Their typical process required taking information added into Salesforce and manually entering it into NewsCycle's Adbase product. Adbase does not communicate with Salesforce.
- They faced the following challenges in their existing environment.
 - In their existing system, Opportunities were created for each order processed by their advertising clients. These orders were reviewed and perfected in the SFDC environment and moved through their business process manually via data entry into NewsCycle's Adbase.
 - Changes and updates to the orders were handled manually via the processing of requests through their support queues and sales.
 - Sales users had inability to see important key account information that would slow down the approval process for orders entered due to late status of payments and a variety of other situations.
 - The existing system did not allow the sales user to see everything they needed to see in terms of relationships and status of their accounts for use in negotiating new deals, working to rectify accounting issues and determining relationships between agents and clients that were representing themselves independent of agents.

Newsday, Inc. – Adbase Integration

- **Customer Industry:** Media

- **Customer summary :**
Newsday, Inc. is a print and electronic media company based in New York state, providing services throughout the greater New York area.

- **Services Provided:**

- Salesforce.com Integration, Customization and Configuration.
- Standard Salesforce objects, custom objects and integration to legacy non salesforce Adbase software system.

- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com integrations and past experience with the company Newsday was a return client.

- **Relationship Owner/SME**
Gururaj Havanur/Puneet Khosla

Solution:

- An intensive design scoping meeting was held on site with team members from OSI, NewsCycle and Newsday. The object was to outline a solution that would form a basis for connecting the existing Salesforce.com environment to the existing NewsCycle Adbase application. Separation of duties, management and tasks was outlined to clarify the project.
- Following were the part of the solutions provided.
 - Using the provided NewsCycle API for salesforce (for outbound orders), OSI re-engineered the code to accommodate Newsday's customized business process. Where NewsCycle used Opportunities, Newsday used custom objects for reservations. This mapping was not in the API. OSI's development team recreated the API to accommodate this and other functionality.
 - Working closely with NewsCycle development teams, OSI and Newsday were able to use mapping tools to pull data back from the Adbase application and bring that data into Salesforce to a variety of standard and non standard objects using custom APIs and technology. NewsCycle teams provided the means of getting data out of Adbase and OSI teams provided the basis to pull that data into Salesforce to create a seamless business process.
 - OSI provided Engagement Management, Technical and Solutions Architecture documents and an engagement process to accomplish the goals of this project on time and within budget.



Newsday, Inc. – Adbase Integration

- **Customer Industry:** Media
- **Customer summary :**
Newsday, Inc. is a print and electronic media company based in New York state, providing services throughout the greater New York area.
- **Services Provided:**
 - Salesforce.com Integration, Customization and Configuration.
 - Standard Salesforce objects, custom objects and integration to legacy non salesforce Adbase software system.
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com integrations and past experience with the company Newsday was a return client.
- **Relationship Owner/SME**
Gururaj Havanur/Puneet Khosla

Results:

- Reservation entry in Salesforce custom objects was preserved so training on the newly integrated system was minimal for the team.
- Duplication of effort was all but eliminated for reservation entry into the Adbase system, accomplishing the "Game Changing" result for the client.
- Data returned from the Adbase application to the Account and several custom objects provided the tools necessary for sales to understand their clients accounting circumstances, relationships with agents working with them and negotiation strategies based on provided information from the previously unseen data.
- The clients comments related to the project were accurate in that the game changing processes created by OSI allow his teams to now concentrate on revenue producing activities instead of duplicating their efforts with data entry tasks.



Industry :Health Care & Non Profit

- Clients :-

- The Schumacher Group
- Cook Children's



The Schumacher Group

- **Customer Industry:**
Healthcare
- **Customer summary:** One of the nation's largest and fastest-growing health care They partner with more than 3,000 providers to help treat more than 4 million patients a year.
- **OSI Practice engaged:**
salesforce.com
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.
- **Relationship owner/SME:**
Puneet Khosla

Challenges:

- Schumacher Group was faced with the ongoing growth and evolution of four major business lines: Wellness Works, Care Management, Emergency Medicine/Hospital Medicine, and Revenue Cycle Services
- In order to keep their internal resources focused on other in-house projects, Schumacher Group required the support of a strong external team who could manage, maintain and enhance their various Salesforce instances and the related systems that support those four quickly evolving business areas.



The Schumacher Group

- **Customer Industry:** Healthcare
- **Customer summary:** One of the nation's largest and fastest-growing health care They partner with more than 3,000 providers to help treat more than 4 million patients a year.
- **OSI Practice engaged:** salesforce.com
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.
- **Relationship owner/SME:** Puneet Khosla

Solutions:

- OSI's Application Sustainment and Salesforce experts provide Schumacher Group with production support, configuration services and planned enhancements for the different Salesforce instances supporting each of their Lines of Business.
- Other related application systems that are supported by OSI's team include Informatica Cloud, SQL Server Reporting Services, various third party App Exchange packages, and Salesforce add-ons like Data.com.
- Each major Schumacher Line of Business is supported, with a shared Project Manager overseeing the teams and a shared Quality Assurance expert to ensure our workmanship and quality.
- Schumacher appreciates the round the clock availability of OSI's IT resources, particularly possible due to the time zone differences in our India delivery location, which helps ensure production support issues are resolved quickly.



The Schumacher Group

- **Customer Industry:**
Healthcare
- **Customer summary:** One of the nation's largest and fastest-growing health care They partner with more than 3,000 providers to help treat more than 4 million patients a year.
- **OSI Practice engaged:**
salesforce.com
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.
- **Relationship owner/SME:**
Puneet Khosla

Results:

- Schumacher is able to re-direct approximately \$1.17M back to their business by outsourcing.
- Increased Customer participation and their satisfaction.



Cook Children's

- **Customer Industry:** Healthcare
- **Customer summary:** Cook Children's is one of the country's leading integrated pediatric health care delivery systems.
- **OSI Practice engaged:** salesforce service Cloud
- **Services Provided:**
 - Service Cloud Solutions
 - Helpdesk portal
 - Case Management
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.
- **Relationship owner/SME:** Kanishk Prasad

Challenges:

- The customer portal had low user adoption that resulted in more phone calls than necessary and poor cell phone connectivity caused a need for pager and text message interaction.
- Cases were passed between departments without resolution and there was no central dashboard for IT update schedules, workflow or status.
- Executive management elected to move to Salesforce.com Service Cloud for Cook's various call centers. Cook Children's Health Care System required a partner that could expertly implement the Salesforce Service Cloud.
- By implementing Salesforce for both their Residential and Commercial business lines, DirecTV also met another requirement to use analytics to measure and continually improve team performance across the systems



Cook Children's

- **Customer Industry:** Healthcare
- **Customer summary:** Cook Children's is one of the country's leading integrated pediatric health care delivery systems.
- **OSI Practice engaged:** salesforce service Cloud
- **Services Provided:**
 - Service Cloud Solutions
 - Helpdesk portal
 - Case Management
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.
- **Relationship owner/SME:** Kanishk Prasad

Solutions:

- OSI implemented Salesforce Service Cloud for Cook Children's to support 170 service cloud users and 6,000 portal users at high volume.
- Several layers of workflow and notification processes were implemented to keep team members informed of case reassignments, to alert IT to a high priority case, and to update users via text, if preferred.
- Service Cloud helped support an enhanced Help Desk through a visual calendar fed by change events, Chatter collaboration for change management and approvals, knowledge sharing via agent console and portal and improved triggers for provisioning new employees.



Cook Children's

- **Customer Industry:** Healthcare
- **Customer summary:** Cook Children's is one of the country's leading integrated pediatric health care delivery systems.
- **OSI Practice engaged:** salesforce service Cloud
- **Services Provided:**
 - Service Cloud Solutions
 - Helpdesk portal
 - Case Management
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.
- **Relationship owner/SME:** Kanishk Prasad

Results:

- More consistent answers provided by agents to users due to the shared agent portal and expanded knowledge base.
- More satisfied users and callers.
- Improved agent productivity and accountability.
- Better collaboration and change management through use of Chatter.
- Faster and more accurate on-boarding of new employees.
- Cook Children's implementation of Salesforce Service Cloud produced a happier, more efficient Help Desk and far more satisfied users.



Industry : Education & Finance

- Clients :-
 - TMS
 - Rosetta Stone
 - Vantage Acceptance
 - EPAY



TMS

- **Customer Industry:** Education
Finance
- **Customer summary:** TMS is leading provider of private student loan solutions for lenders, credit unions, and schools.
- **OSI Practice engaged:**
salesforce.com /Salesforce Service Cloud
- **Services Provided:**
 - CTI Integration tool five9
 - Consolidated View
 - REST –API Service Calls
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.
- **Technologies used:**
Salesforce Service Cloud
- **Relationship Owner/SME:**
Beth Rivelli/Sakshi Jhamb

Challenges:

- With a vast and growing Business and ever growing network of Partners and Customers it was looking at ways to increase collaboration and provide customers and partners with a one stop Solution to upgrade the Salesforce service Cloud operation.
- Was difficult to manage the incoming calls from the customer and had multiple views and consoles to retrieve the information to the Caller and maintain history. They had Cortland as an existing system.
- Cumbersome to manage different Manual actions for the internal Processes.
- Consolidated Data was a Big Problem for TMS.



TMS

- **Customer Industry:** Education
Finance
- **Customer summary:** TMS is leading provider of private student loan solutions for lenders, credit unions, and schools.
- **OSI Practice engaged:** salesforce.com /Salesforce Service Cloud
- **Services Provided:**
 - CTI Integration tool five9
 - Consolidated View
 - REST –API Service Calls
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.
- **Technologies used:** Salesforce Service Cloud
- **Relationship Owner/SME:** Beth Rivelli/Sakshi Jhamb

Solutions:

- Solution was Classified into three modules:
 - 1.Consolidate view to the TMS Users
 - 2.CTI integration for the Called in users
 - 3.REST –API Service calls from the Salesforce to Cortland.
- Data Migration from Cortland to Salesforce.
- Used Service Cloud Console together all related information of the called in User if the system has already otherwise consider the called in user as a new end-user for TMS Support Team. This Provided a single view of Customer (SVOC), providing vital information of school.
- Developed two-way API services call from Salesforce to Cortland Integration and viceversa.
- Developed CTI integration tool five9 for the called in User , When the called in user calls the TMS support , Automatically the details of the called in user are displayed in the console, His Account number, His payment details , existing client etc.



TMS

- **Customer Industry:** Education
Finance
- **Customer summary:** TMS is leading provider of private student loan solutions for lenders, credit unions, and schools.
- **OSI Practice engaged:**
salesforce.com /Salesforce Service Cloud
- **Services Provided:**
 - CTI Integration tool five9
 - Consolidated View
 - REST –API Service Calls
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.
- **Technologies used:**
Salesforce Service Cloud
- **Relationship Owner/SME:**
Beth Rivelli/Sakshi Jhamb

Solutions:

- Case creation for unanswered questions or unfound information.



TMS

- **Customer Industry:** Education
Finance
- **Customer summary:** TMS is leading provider of private student loan solutions for lenders, credit unions, and schools.
- **OSI Practice engaged:**
salesforce.com /Salesforce Service Cloud
- **Services Provided:**
 - CTI Integration tool five9
 - Consolidated View
 - REST –API Service Calls
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.
- **Technologies used:**
Salesforce Service Cloud
- **Relationship Owner/SME:**
Beth Rivelli/Sakshi Jhamb

Results:

- Increased collaboration amongst Customers and TMS.
- One stop shop for all customer queries– thru Service Cloud Console and CTI integration of five9.
- Helped TMS support team to cater better and prompt services online when Partners and customers call in.
- Increased Customer participation and their satisfaction.



RosettaStone

- **Customer Industry:** Education Sector
- **Customer summary:** Rosetta Stone is the world's leading provider of language-learning software. The company brings language immersion techniques to personal, business, public sector and educational learners all over the world, via software and technology.
- **OSI Practice engaged:** Salesforce Service Cloud
- **Services Provided:**
 - Service Cloud Solutions
 - Customer Support Portal
 - Implementation Methodology
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.

Challenges:

- The leading global producer of language-learning software Rosetta Stone sought a robust and flexible solution to support their millions of users in more than 150 countries.
- They sought a new partner better capable of supporting their ever-growing business both efficiently and cost effectively
- The solution they sought had to integrate seamlessly with Oracle and provide for different entitlements based on various tiers of customer.
- Furthermore Rosetta Stone, needed service support that could handle 14 languages, offer customer relationship management (CRM), a user portal, knowledge base, integrated chat solutions, automation and self-service features.



RosettaStone

- **Customer Industry:** Education Sector
- **Customer summary:** Rosetta Stone is the world's leading provider of language-learning software. The company brings language immersion techniques to personal, business, public sector and educational learners all over the world, via software and technology.
- **OSI Practice engaged:** Salesforce Service Cloud
- **Services Provided:**
 - Service Cloud Solutions
 - Customer Support Portal
 - Implementation Methodology
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.

Solutions:

- In just 11 weeks, using the Agile implementation methodology, the roll-out of Service Cloud began to support teams in the U.S., India and Korea with a customer portal solution to engage users.
- The end result supported both the Consumer and Institutional (B2C and B2B) customers worldwide with a tailored portal experience and Knowledge Base search based on product and customer attributes.
- Additional features implemented included case management, custom response templates, Live Agent Chat, and a customized way of tracking software bugs.
- Most importantly, the cloud model provides Rosetta Stone with support at a lower cost with higher quality and efficiency.



RosettaStone

- **Customer Industry:** Education Sector
- **Customer summary:** Rosetta Stone is the world's leading provider of language-learning software. The company brings language immersion techniques to personal, business, public sector and educational learners all over the world, via software and technology.
- **OSI Practice engaged:** Salesforce Service Cloud
- **Services Provided:**
 - Service Cloud Solutions
 - Customer Support Portal
 - Implementation Methodology
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.

Results:

- Rosetta Stone has improved customer experience dramatically with enhanced ability to deliver support in a customer's preferred channel - whether phone, email, self-serve portal or chat
- They have also gained an integrated 360 degree view of their customers and business, including marketing campaigns, cases and assets owned.



Vantage Acceptance

- **Customer Industry:** Debt Settlement/AFCC
- **Customer summary:**
Vantage Acceptance
- **OSI Practice engaged:**
Salesforce.com
- **Services Provided:**
 - CRM Consolidation, Integration with third party tools like Global Client Solutions
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.
- **Relationship owner/SME:**
Gururaj Havanur/Jim Daviner/
Sanchit Singhal

Challenges:

- Vantage Acceptance is in debt reduction business. It uses many different software systems (Velocify, Debt Pay Pro, Microsoft office etc.) and manual steps to implement its business processes and accomplish business goals.
- To consolidate their CRM systems and bring them under one roof, Vantage Acceptance engaged OSI to implement an integrated CRM solution in salesforce.com. A single system (Capable to integrate with their third party systems) which is available on demand and helping Vantage Acceptance to get an integrated view of their clients.
- Integration with their telephone systems (IntelePeer) to have the telephony sub processes integrate with their overall business process.
- Integration with their back office .NET based payment processor application to have the payment sub processes integrate with their overall business process.
- Obtaining digital signatures from client on legal documents.
- Transition away from Desk.com currently used for customer service functions.



Vantage Acceptance

- **Customer Industry:** Debt Settlement/AFCC
- **Customer summary:**
Vantage Acceptance
- **OSI Practice engaged:**
Salesforce.com
- **Services Provided:**
 - CRM Consolidation, Integration with third party tools like Global Client Solutions
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.
- **Relationship owner/SME:**
Gururaj Havanur/Jim Daviner/
Sanchit Singhal

Solutions:

- Configured features of Salesforce.com using Roles, Profiles, Organization Wide Settings, Sharing Rules, Field Creation, Validation rules, Reports, customization of standard Objects and creation of Custom Objects.
- Developed custom user interfaces similar to their legacy systems to reduce learning curve and operational overheads within the client sales and customer service team.
- Implementation of the third party integrations with Credit Report agencies and payment gateways to transact and view within salesforce. This would help the Sales teams to enroll new clients and manage debt settlement negotiations. Used native apex capabilities in conjunction with a .NET based application to implement third party integrations.
- Implemented CTI with IntelPeer using Open CTI framework.
- Adobe Sign (formerly EchoSign) was integrated within Salesforce to automate legal document generation and signature flows.
- Implemented On Demand Email-to-Case capabilities to automate case management processes.
- Implemented custom On Demand file storage solution with SharePoint.



Vantage Acceptance

- **Customer Industry:** Debt Settlement/AFCC
- **Customer summary:**
Vantage Acceptance
- **OSI Practice engaged:**
Salesforce.com
- **Services Provided:**
 - CRM Consolidation, Integration with third party tools like Global Client Solutions
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations and competitive rates.
- **Relationship owner/SME:**
Gururaj Havanur/Jim Daviner/
Sanchit Singhal

Results:

- Increased collaboration among a diversified Sales team consisting of Customer Service Reps, Debt Specialists and Negotiators leading to a massive increase in sales efficiencies.
- Single unified business process implementation comprising of complex third party integrations, CTI, document management.
- Considerable savings in overall recurring expenditure on IT systems because of system consolidations and effective use of existing systems like SharePoint.
- Created scope for business expansion through bringing affiliates on board with connected partner communities.



EPAY Systems Inc.

- **Customer Industry:** Financial Services
- **Customer summary:**
EPAY provides accounting services for the Human Resources and Payroll industry, using Salesforce to assist, organized and control their client base.
- **OSI Practice engaged:** Salesforce.com – Communities and Lightning Components.
- **Services Provided:**
 - Create a customized template based community portal for their client base.
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations for the financial industry and communities practice.
- **Relationship Owner/SME:** Brittney Lamping / Jim Daviner/ Puneet Khosla

Challenges:

- EPAY provides accounting services for the Human Resources and Payroll industry, using Salesforce to assist, organized and control their client base.
- To accommodate their growing business needs, EPAY wanted to take their old customer portal and transition it into a new template based community portal, but with added customizations that would allow a less manual approach to document handling.
- A review of their case management process for future recommendation was requested.
- Implementation with their existing LMS Learning application to the template based portal.
- Custom functionality around document upload and download for new client onboarding and servicing of existing clients.



EPAY Systems Inc.

- **Customer Industry:** Financial Services
- **Customer summary:**
EPAY provides accounting services for the Human Resources and Payroll industry, using Salesforce to assist, organized and control their client base.
- **OSI Practice engaged:** Salesforce.com – Communities and Lightning Components.
- **Services Provided:**
 - Create a customized template based community portal for their client base.
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations for the financial industry and communities practice.
- **Relationship Owner/SME:** Brittney Lamping / Jim Daviner/ Puneet Khosla

Solutions:

- Created the Napili based template community
- Implemented the LMS Learning application from CyberU into the community portal, keeping with the branding solutions provided by the Napili template and Lightning component creation.
- Created custom upload and download functionality into custom objects and Notes and Attachments from within the community using custom Lightning components.
- Created multiple levels of access for files based on customized objects for confidential data, allowing users from the same company to see data only their levels of security would allow.
- Provided a customized menu system for the client base to use that will allow for future additions to the menu selection.



EPAY Systems Inc.

- **Customer Industry:** Financial Services
- **Customer summary:**
EPAY provides accounting services for the Human Resources and Payroll industry, using Salesforce to assist, organized and control their client base.
- **OSI Practice engaged:** Salesforce.com – Communities and Lightning Components.
- **Services Provided:**
 - Create a customized template based community portal for their client base.
- **Why they chose OSI:** OSI's Extensive experience in Salesforce.com implementations for the financial industry and communities practice.
- **Relationship Owner/SME:** Brittney Lamping / Jim Daviner / Puneet Khosla

Results:

- Increased usability for clients using the customer portal with a single branded experience and simpler navigation choices provided by the Napili template.
- Custom lightning components provided all required functionality that was missing in the original community, allowing the user to simply upload and download documents as needed for their day to day operations, and simplifying the manual process that was previously in use.
- Recommendations for adjustments to the Case handling process are in review for future work with this client.



Industry: Customer Reference Management

- Clients :-

- Boulder Logic



Boulder Logic

- **Customer Industry:** Customer Reference Management
 - **Customer summary:**

Boulder Logic is the leader in delivering enterprise customer reference management software and services for complex sales and marketing environments. Boulder Logic has helped large and small firms gain market credibility and accelerate their sales cycles by using customer stories.
 - **OSI Practice engaged:**

Dot Net development, Salesforce Integration and testing
 - **Services Provided:**
 - Salesforce API integration
 - Salesforce 1 mobile integration
- Why they chose OSI:** OSI's Extensive experience in Dot Net implementation, Salesforce.com implementations and competitive rates.

Challenges:

- Boulder Logic is a product ideated to fill the gaps in CRM left by Salesforce. The major gap Boulder Logic targets is, maintaining references and their usage obeying complex yet user friendly workflows.
- Boulder Logic was to depict itself as a part of Salesforce, to maintain seamless user experience of Salesforce users.
- Boulder Logic needs to utilize the vast customer data like Accounts, Contacts, Opportunities etc for reference management program using Salesforce integration and achieving real time synch between both the systems.
- Furthermore Boulder Logic, needed to integrate its mobile application as part of Salesforce 1 application.



Boulder Logic

- **Customer Industry:** Customer Reference Management
 - **Customer summary:**

Boulder Logic is the leader in delivering enterprise customer reference management software and services for complex sales and marketing environments. Boulder Logic has helped large and small firms gain market credibility and accelerate their sales cycles by using customer stories.
 - **OSI Practice engaged:**

Dot Net development, Salesforce Integration and testing
 - **Services Provided:**
 - Salesforce API integration
 - Salesforce 1 mobile integration
- Why they chose OSI:** OSI's Extensive experience in Dot Net implementation, Salesforce.com implementations and competitive rates.

Solutions:

- For fetching data from Salesforce objects we are using Salesforce API.
- Used Inbound/Outbound messages for updating data in to Boulder Logic.
- Seamless integration with Salesforce is provided using IFrame and Visual Force programming.
- Additional features implemented includes, developing Apex controllers to customize the view of Salesforce Page.
- Integrated with Salesforce
 - Salesforce 1 Canvas App and Apex (mobile app integration)
 - Salesforce OAuth (mobile web integration)



Boulder Logic

- **Customer Industry:** Customer Reference Management

- **Customer summary:**

Boulder Logic is the leader in delivering enterprise customer reference management software and services for complex sales and marketing environments. Boulder Logic has helped large and small firms gain market credibility and accelerate their sales cycles by using customer stories.

- **OSI Practice engaged:**

Dot Net development, Salesforce Integration and testing

- **Services Provided:**

- Salesforce API integration
- Salesforce 1 mobile integration

Why they chose OSI: OSI's Extensive experience in Dot Net implementation, Salesforce.com implementations and competitive rates.

Results:

- Boulder Logic is successful in growing its business and partnering with more than 70 Salesforce Customers and still counting.
- They are now one of the big players in Reference Management domain.



Industry: Consumer Goods

- Clients :-

- Sony

Sony

- **Customer Industry:** Consumer Goods
- **Customer summary:**
Sony Professional supplies audiovisual and technology solutions to businesses, integrating software and systems to help our customers achieve their individual business goals.
- **OSI Practice engaged:**
Salesforce.com , ServiceMax, Salesforce Community
- **Services Provided:**
 - Implemented Salesforce community with ServiceMax functionality.
- **Why they chose OSI:** OSI's experience in Salesforce.com implementations and being partners with ServiceMax (through Astadia)
- **Relationship Owner/SME:**
John Cooper/Puneet Khosla

Challenges:

- Sony is the leading supplier of AV/IT solutions to businesses across a wide variety of sectors including, Media and Broadcast, Video Security, Retail, Transport and Large Venue markets. It delivers products, systems and applications to enable the creation, manipulation and distribution of digital audio-visual content that adds value to businesses and their customers.
- To move away from traditional approach of providing services which was more on single engineer / single equipment based and the repair history, technical information mostly remained with the technician
- Contract management and entitlements which are now complicated required a proper management and ensuring that the customers are not claiming entitlements for an expired contract or Sony doesn't miss giving benefits to the customer who have a valid contract
- With the growing business and different types and varieties of equipments and ever increasing customer base, it was getting difficult to manage information using traditional systems.
- Reporting use to happen in excel and use to take a lot of time to build which at times became irrelevant



Sony

- **Customer Industry:** Consumer Goods
- **Customer summary:**
Sony Professional supplies audiovisual and technology solutions to businesses, integrating software and systems to help our customers achieve their individual business goals.
- **OSI Practice engaged:**
Salesforce.com , ServiceMax, Salesforce Community
- **Services Provided:**
 - Implemented Salesforce community with ServiceMax functionality
- **Why they chose OSI:** OSI's experience in Salesforce.com implementations and being partners with ServiceMax (through Astadia)
- **Relationship Owner/SME:**
John Cooper/Puneet Khosla

Solutions:

- Installed the Service Max base package
 - Modified / Created SFMs / Wizards to customize the functionality as per the requirements in the following areas:-
 - Contracts , Entitlements
 - Case / Work Order / SLA
 - Account
 - Contact
 - Order Estimates
 - Logistics
 - Output Documents
 - Technicians – Skills , Dispatch Console, etc.
 - Implemented Community to allow Customers to directly raise cases , track work orders, etc.
 - Implemented custom workflows , triggers, validation rules, etc. to provide advance functionality to end users
 - Developed Reports as per requirements
- Company Confidential – For internal use only



Sony

- **Customer Industry:** Consumer Goods
- **Customer summary:**
Sony Professional supplies audiovisual and technology solutions to businesses, integrating software and systems to help our customers achieve their individual business goals.
- **OSI Practice engaged:**
Salesforce.com , ServiceMax, Salesforce Community
- **Services Provided:**
 - Implemented Salesforce community with ServiceMax functionality
- **Why they chose OSI:** OSI's experience in Salesforce.com implementations and being partners with ServiceMax (through Astadia)
- **Relationship Owner/SME:**
John Cooper/Puneet Khosla

Results:

- Improved the field service experience and customer relationship management thus increasing customer satisfaction.
- Better Entitlements process in place to ensure that company or the customer do not suffer any financial loss.
- Better case and work order management with proper technician and equipment assignment.
- Faster reporting.
- Sony also shared their thoughts in success stories and in Computer weekly.

[Sony Customer Success Video](#)

[Sony Computer Weekly Article](#)




Sony

- **Customer Industry:** Consumer Goods
- **Customer summary:**
Sony Professional supplies audiovisual and technology solutions to businesses, integrating software and systems to help our customers achieve their individual business goals.
- **OSI Practice engaged:** Salesforce.com , ServiceMax, Salesforce Community
- **Services Provided:**
 - Implemented Salesforce community with ServiceMax functionality
- **Why they chose OSI:** OSI's experience in Salesforce.com implementations and being partners with ServiceMax (through Astadia)
- **Relationship Owner/SME:** John Cooper/Puneet Khosla

Results:

- Appreciation from ServiceMax Senior project manager



Carlos Madeira
Senior Project Manager at ServiceMax 4h

Great video by John discussing the drivers and benefits of ServiceMax to Sony. It was a great project to manage, great client and implementation teams working together for success. [Nitin Patel](#) [Puneet Khosla](#)

ServiceMax Customer Video: Sony

John Cooper
Head of Service & Support,
Sony Professional

ServiceMax Customer Video: Sony
YouTube • Uploaded by ServiceMax on 2015-11-02.



Industry: Testing, Certification & Training Services of Equipments

- Clients :-

- Inspecta

Inspecta

- **Customer Industry:** Testing / Certification / Training / Consultancy of Equipments
- **Customer summary:**
Inspecta Group offers a large variety of testing, inspection, certification, consultancy and training services.
- **OSI Practice engaged:**
Salesforce.com , Service Max, ServiceMax Mobile for Laptops, Crystal Reports
- **Services Provided:**
 - Consultancy for ServiceMax and implemented reports for Service Max desktop app.
- **Why they chose OSI:** OSI's experience in Salesforce.com implementations and being partners with ServiceMax (through Astadia)
- **Relationship Owner/SME:**
Marko Anic / Puneet Khosla

Challenges:

- Inspecta Group offers a large variety of testing, inspection, certification, consultancy and training services. The Group employs more than 1250 employees in Finland, Sweden, Norway, Denmark, Poland and the Baltic States. Inspecta's goal is to create safety, trust and environmental sustainability in Northern Europe.
- Inspect Fire Division implemented ServiceMax for field service and issuing safety certificates onsite.
- Provide ease of using the system.
- The system should also automatically raise requests when a preventative maintenance check was due



Inspecta

- **Customer Industry:** Testing / Certification / Training / Consultancy of Equipments
- **Customer summary:**
Inspecta Group offers a large variety of testing, inspection, certification, consultancy and training services.
- **OSI Practice engaged:**
Salesforce.com , ServiceMax, Service Max Mobile for Laptops, Crystal Reports
- **Services Provided:**
 - Consultancy for ServiceMax and implemented reports for Service Max desktop app.
- **Why they chose OSI:** OSI's experience in Salesforce.com implementations and being partners with ServiceMax (through Astadia)
- **Relationship Owner/SME:**
Marko Anic / Puneet Khosla

Solutions:

- Modified / Created SFMs / Wizards to customize the functionality as per the requirements in the following areas:-
 - Work Orders
 - Preventive Maintenance
 - Output Documents
- Used Crystal Reports for integrating with the Service Max mobile for offline clients to generate fire safety certificate onsite.



Inspecta

- **Customer Industry:** Testing / Certification / Training / Consultancy of Equipments
- **Customer summary:**
Inspecta Group offers a large variety of testing, inspection, certification, consultancy and training services.
- **OSI Practice engaged:**
Salesforce.com , Service Max, ServiceMax Mobile for Laptops, Crystal Reports
- **Services Provided:**
 - Consultancy for ServiceMax and implemented reports for Service Max desktop app.
- **Why they chose OSI:** OSI's experience in Salesforce.com implementations and being partners with ServiceMax (through Astadia)
- **Relationship Owner/SME:**
Marko Anic / Puneet Khosla

Results:

- Improved the field service experience.
- Preventive Maintenance Alerts / Work Orders were raised on time
- Fire certificate could be instantly generated onsite and given to the customer and at the same time were also recorded in the system.
- System for field service engineers was easy to use.

