Salesforce Case Studies

Damco Solutions

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1. Salesforce CRM Implementation for a Prestigious Asset Management company

Damco helped a prestigious asset management company, replace a legacy CRM with Salesforce - providing a 360-view to all its customers, activities and provide exceptional customer service to its esteemed customers.

Problem Statement:

Legacy CRM Not Scalable and Unable to Meet the Client's Need.

The client had a legacy CRM implemented which they were using to stay on top of all customer information and upcoming activities. However, this system could not meet their new and future demands. Some of the challenges they faced were:

- The CRM system gave the advisors only a partial view of their clients' information and interactions. A lot of things like upcoming activities dashboard, ongoing opportunities, etc. were all managed manually, leading to a lot of manual effort and discrepancies.

- The system was not user-friendly. The advisors spent a lot of time to obtain all data needed for a client call wasting valuable time.

- There were not adequate security measures in places which are needed especially for sensitive wealth related data.

- The basic data validation rules were missing in the system, leading to a lot of data integrity issues which rendered the entire system almost useless.

- The complex relation between various institutions, consultants and other contacts could not be maintained and accessed easily in the legacy system.

- No unified system for sending email campaigns and tracking them was possible in the legacy system.

Solution:

Salesforce.com Implementation and Data Cleanup and Migration

Damco did a fresh Salesforce implementation for the client, which replaced their legacy CRM. A complete data cleanup was also performed on data exported from legacy system (duplicate checks, validation checks, relationships, addresses, etc.) to ensure the new system had all updated, accurate data.

The new Salesforce CRM provided:

- A 360-degree view of all customers, their associated contacts, all direct and indirect relationships between various institutions and consultants/contacts, along with activities, ongoing and past opportunities for each account.

- An easy way for teams supporting different client groups, as well as sales and marketing teams to collaborate seamlessly using 1 central system.

- A robust security solution that ensured sensitive client financial data was accessible only to those authorized to view/edit it.

- A mobile CRM solution that gave advisors secure access to client data on their mobiles and tablets.

- A central place to view all recent news related to a specific account or customer - enabling the advisors to stay abreast with the latest updates in the market.

- An effective dashboard which provided key insights to advisor's upcoming activities and productivity, as well as opportunity win rates.

- Effective campaign management and tracking.

Damco also provided the end user training to the client's staff to ensure easy transition to start using the new system effectively.

End Business Result:
More Productive Advisors, Happier Clients

Moving to Salesforce.com provided the client an effective way to access key customer information, enabling much better productivity for its advisors and much better customer service. Some of the derived business benefits included:

- **Greater Client Satisfaction:** Centralized access to client information enabled the managers to respond to a client's request, reducing response times and improving client service.

- **Increased Productivity:** Because the client's users could access most of the information they need through the Salesforce.com interface, they spend less time searching for information. This meant hours and hours saved per week per advisor.

- **Increased Advisor Focus on Client Investments and Growth:** Because the advisors did not waste time on searching for information anymore, and they had access to all needed information in 1 centralized place, this led to increased focus on client investments and business growth.

- **Robust Security for Sensitive Client Financial Data:** The client finally had a system where all the sensitive client data was secure, because of Salesforce's robust security features.

2. A Complete System Audit for A Widely Recognized Allergy Testing Facility

The client is widely recognized as one of the leading food and environmental allergy testing facilities in the world. They have a comprehensive IT ecosystem setup comprising of Salesforce (CRM), Pentaho (ETL), Orchard Harvest (Lab Information System) and ELISA (the machine on which allergy tests are run).

Problem Statement:

Current System Not Able to Keep Up with Customer Demand

The client was not able to keep up with the huge demand for allergy tests using the machine ELISA. They decided to upgrade to a newer technology machine called VIDIA which could run more tests for more food samples much faster than ELISA. Updating to the new machine entailed changes in the entire IT ecosystem (Salesforce, Pentaho, Orchard Harvest) to accommodate the new machine. These changes were made by different third-party vendors respectively for the three IT subsystems, but they could not be deployed in production because of various errors and deployment failures.

The client was looking for a partner to conduct a comprehensive audit of their newly developed system currently lying in sandbox environment, to highlight any missing best practices, or errors that might come up during deployment.

Solution:

End to End Audit of Complete IT System

Damco undertook this challenging endeavor to collaborate with various vendors to get a complete system understanding, and then analyze the system to check whether:

- A sound framework and architecture is in place to make system flexible, scalable, and configurable.
- The functional and technical operations are being performed as per requirements.
- The implemented integration engine is smooth, simple, and easy in operation.
- All industry best practices have been following while developing the code and the architecture.
- The documentation is up to date and useful.

Based on the comprehensive audit conducted by Damco, the client got all the necessary information related to:

- The specifics of all critical errors that could have come up on deployment because of the missing best practices, along with corrective measures/solutions
- Business process improvements that could make their business flow more smoothly and efficiently.
- All necessary documentation that was missing or incomplete.
- Technical and functional recommendations.
- A detailed testing plan to test out various components independently as well as in integrated environment.
- A detailed deployment strategy including the environment readiness, testing readiness, documentation readiness as well as a smooth roll back strategy in case the production deployment fails.

Business Benefits:

A More Robust System

Getting a complete system audit done by Damco, enabled the client to:

- Identify the critical errors in their system.

- Chalk out a detailed testing and deployment strategy to ensure the new system is working as expected.

- Understand the business process improvements that could be done in order to make the system more robust and efficient.

- Minimize the probability of production deployment failure, leading to huge business losses.

3. Salesforce Schema Redesign and Re-Implementation for a Non-Profit Organization

The client is a non-profit organization which enables conservation decisions by supplying partners with difficult to obtain data and outreach by leveraging the unique skills of the adventure community.

Problem Statement:

The company was already using Salesforce, but the data schema and design was not allowing the company to define their users and relationships correctly. Some of the challenges they faced because of the original schema design included:

- Lack of ability to capture similar data at one single place.
- Connecting a piece of data with the other related data, that is, there was no defined interaction among the data that was being captured in SF.
- There was no automated way to capture the information entered on their website to different salesforce entities.
- There was also no integration with their billing and accounting systems.

Solution:

Salesforce Schema Redesign and Implementation

Damco worked with the client to understand their challenges in the current Salesforce Org, and then redesign the complete schema to ensure all entities and data could be captured accurately and the right relationships could be defined between them. The new Salesforce environment provided the client:

- A Centralized place to capture all their data and entities, with correct relationships defined between different entities.
- Automations in place to automate their business processes to the maximum extent possible, minimizing the manual intervention required.
- Integration with their website to capture information being input there on different salesforce objects.
- Integration with Gmail.
- Integration with QuickBooks- their accounting system.

Business Benefits:

A More Efficient, Inter Connected System

Redesigning and implementation of Salesforce instantly helped the client in various ways:

- Enter information and relationships accurately.
- Easy access to related information as opposed to disparate information before.
- Streamlined process that gives the overall view related to the Adventurers who go on for the Expeditions and send their data.
- Fully automated system cutting down the manual efforts to the maximum.
- Integration of their accounting system that is QuickBooks using Workato as a tool.
- Huge cost savings when compared to other local vendors.

4. Salesforce Implementation for a Leading Air Testing Solutions Provider

Damco helped a leading air testing solutions provider in United Kingdom implement Salesforce CRM.

Problem Statement:
Inadequate Field Service Management

The client was facing a lot of challenges managing their mobile field service workforce, keeping a track on customer requests and providing quality service to end customers. They were looking for a partner to implement a new system for their field service engineers and develop automations and processes to streamline their unstructured business process. They also needed this system to integrate with their invoicing and billing systems. Some of the main challenges they faced were:

- Creating and keeping track of customer request for service and bring them to closure on time.
- Keeping track of which field engineer was assigned to which case, and identify who had the bandwidth to pick up the next customer request.
- Structuring their team in terms of the skill sets each of them possessed, and the territories they serviced.
- All manual effort and work led to discrepancies and contradictions.

Solution:
Implement Salesforce Sales and Service Cloud

Damco recommended Salesforce Sales and Service cloud implementation to the client to effectively orchestrate the Sales and Service processes for them, helping with providing better service to their customers, while closely tracking the field engineers. The new CRM provided them the ability to:

- Enter all information related to customers, service sites, open and closed service requests, technicians, skill sets, service territories, price lists, invoices in one central place.
- Create customer request cases and track them to closure effectively.
- Identify the best available technician for a particular service request.
- Monitor service requests and field engineers closely with the help of various reports and dashboards.
- Automate their business processes to the maximum extent possible, minimizing the manual intervention required.
- Integration with Outlook.
- Integration with QuickBooks - their accounting system

Business Benefits:
A More Efficient Customer Service

The new Salesforce system led to:

- An efficient system which could track all the details required for effective customer service.
- Huge cost reduction from their previous on premise software.
- Automated processes leading to minimum manual intervention.
- Better reporting and visibility for the Senior Management.

5. Custom Salesforce Development for the Largest Water Solutions Application Provider

The client is the largest provider of complete control solutions for water applications in North America, offering a broad end to end suite of products and services.

Problem Statement:

Inadequate Capacity to Manage All Salesforce Related Customizations

The customer was looking for a trustworthy partner for a long term engagement to support their dynamic business system hosted on Salesforce platform. Customer's Salesforce org was heavily customized and was used across their multiple business teams which needed constant intervention of Salesforce developers for constant release upgrades, customizations and standard Salesforce configurations. In the past, they tried to work this out using some freelancers and other vendors but were not satisfied with their deliverables.

Solution:

Damco's Flexible Team and Delivery Model

- The customer was not sure about the effort that they will need on a monthly basis and was not keen on a dedicated development team/Salesforce consultant initially. Damco proposed a Time and Material model for the client to begin with where the consultant provided the required guidance to the client to scope the business requirements into technical ones and came up with a high level estimate.

- Once they had sufficient work to work with dedicated team Damco provided the team to the client as part of Damco's BYT (Build Your Team) model which give the customer the flexibility to work with the consultants as their external team members, ensures better collaboration and productivity since the same person is aligned for the contract tenure ensuring minimal transition needs.

Business Benefits:

Happier Business Teams

- Faster turnaround time for production support issues due to extended overlapping hours.

- Faster production deployment for development items.

- Happy business teams since their requests were addressed faster than ever.