

Company Overview

Industry Type
Consumer Staples

Location
California, USA

Solution Used
API Integration

“ Hassle-free Project Management And Tracking Issue-Resolution Through an Agile Accelerator-App ”



Challenge

- Jane’s customer support team lacked means to report on metrics and track issues faced by their retail stores and were on the lookout for a suitable platform.
- Issues needed to be categorized to direct it to the most fitting and relevant teams for swift and lasting resolutions.
- For new development work, our client tracked all development tasks on Trello (project management tool) which led to multiple repetitive tasks by the users and inflated time-consumption.
- Finally, the client wanted to ensure that all relevant details were captured accurately before Opportunity closure



Solution

- We implemented a case management solution for the client to easily track issues raised by their retail stores. Also, the cases could be assigned to appropriate teams based on their types and subcategories.
- Further, our solutions paved the way for enhancements where customers would be able to raise issues directly through the online portals.
- Aside from this, we installed and customized the Agile Accelerator App from the AppExchange, so all project management activities could be controlled through a centralized Salesforce instance.
- By setting off of validations, rules, and workflows over Opportunities, we could ascertain that all information was correctly captured.



Result

- Implementing the case management solution eliminated annoyances related to tracking and ensured that issues were no longer being tracked over spreadsheets and emails.
- Cases were readily reportable, letting the client address persisting issues.
- Notably, Jane Technologies saw a significant uptick in productivity, as they no longer switched between multiple apps to track operational data.
- Also, the incorporation of Salesforce’s mature ecosystem and centralized data simplified project management wholly, with cleaner data now making its way to a unified database.