

# CASE STUDY: SALESFORCE ENABLED SUPPORT RESOURCE HUB FOR A SOFTWARE FIRM



## BACKGROUND

The company is a fast growing software firm transforming their business model from traditional software licensing model to a subscription based one. The transformation, following an acquisition by a Private Equity firm, entailed building self service into all aspects of their business across sales & marketing, support. The current custom website and customer forum had until then un without any self service capabilities and no integration with Salesforce CRM.



## VARASI CONTRIBUTION

Varasi team designed and built a Salesforce Communities based self-service portal. We architected and implemented an end-to-end customer experience across the product catalog, shopping cart, purchase and e-sign integration. It involved migrating the existing custom community to the Salesforce Community enabled by Salesforce Knowledge. As part of the transition, Varasi team led the exercise of first defining the structure of articles, topics and solutions in the target community. Additionally, we identified clear roles for knowledge authors and approvers, the workflows around content creation, approval, publication and management and trained the user base. The existing community articles needed to be migrated after mapping them to the new structure.

Resource Hub Architecture

Article & User Migration

Salesforce Knowledge Setup

Salesforce Integration



## VALUE REALIZED

Over 1000 external users migrated over from current community to Salesforce, 300+ articles, over 500 discussions and comments migrated

- Streamlined process for creating, editing and publishing Salesforce Knowledge articles
- Resource hub for members providing access to knowledge articles, product use cases, training materials, technical support, and product certification exams.