



# 6 Customer Success Stories

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# Salesforce Consulting and Implementation Partner for Every Business Across Industries

- » In today's uber-competitive corporate world, smart organisations understand that they need to put customers at the centre of everything they do. Indubitably, the key to serving customers better and wowing them with delightful experiences is through Customer Relationship Management (CRM). Salesforce offers the most powerful technology to leverage both CRM strategies and outcomes.
- » Salesforce CRM helps millions of organisations globally identify new opportunities, drive marketing campaigns, manage and utilise customer data, and enhance internal and external communications. Ultimately, it helps them improve their decision-making ability and spur more potent business growth.
- » Several companies find that 'out-of-the-box' software solutions do not suffice to meet their business needs effectively. Salesforce Development equips them with the power to create useful software solutions and Salesforce services that are tailor-made to suit their requirements.
- » This eBook introduces you to six of our clients from different industries with varied business needs. However, there's one thing common among all of them – they all achieved phenomenal business results through Salesforce with the expertise of TechForce Services.

# Managing 'Student Enrollment Process' for 'A Trusted Name In Legal Education Industry'

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## Key Challenges Faced

- » Understanding the 'existing' state of the student enrollment process
- » Identifying the key dependencies
- » Re-mapping of reports and dashboards to the new object
- » Conga related dependencies – templates and triggers
- » Re-mapping of enrolment forms to the new object
- » Migration of 70,000+ records of existing data without impacting existing set-up

## Solution Provided

- » Use of Salesforce to take care of student enrollment and sales process
- » Enrollments built on Opportunity (standard object)
- » Freeing up Opportunity from the enrollment process and using it for the standard sales process
- » Building of a custom student enrollment object for the student enrollment process to save opportunities for sales process.

## Outcomes & Benefits

- » Shift from Standard Opportunity to Custom Object facilitating the realisation of the full potential of the Opportunities
- » Benefits from this shift resulted in improvement in Sales and Marketing processes
- » No negative impact on student enrolment process, the functionality, and the business process, which were all maintained as it was



# Enhancing 'Stakeholder Experience with Positive Roi' for '#1 Skilled Talent Marketplace'

## Key Challenges Faced

- » Lack of archiving set-up causing data storage issues
- » Uni-directional integration with Salesforce leading to incomplete and duplicate management of records
- » Reorganization of the customer company
- » Change in executive/sales leadership
- » Customer unsure about improving operating efficiency
- » Limited data visibility issue for stakeholders



## Solution Provided

- » Tactical and strategic architectural discussions with key stakeholders for positive business impact.
- » Focus on both upstream function and downstream systems
- » Detailed understanding of customer's business for setting up of duplicate rules
- » Migration to 'Lightning' platform as a best practice making all new and future

## Outcomes & Benefits

- » Freed up space from 150%+ of licenced capacity to within capacity
- » Implementation of enhanced duplicates control system ensuring non-recurrence of the problem
- » Improved data visibility for both internal and external users
- » The problem-solving approach to address the immediate business problem of customer.

# Empowering Policy Holders With 'Salesforce Lightning' For A 'Leading Global Financial Services Firm'

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## Key Challenges Faced

- » Existence of a wide gap in delivering "ease of doing business" with advisors and end customers
- » Need for a new and advanced portal by customer to allow 'ease of access' of investment details to users
- » Providing a novel approach to enhance customer experience for advisors and end customers
- » Spending a significant amount of time over phone while talking to advisors for collection of information

## Solution Provided

- » The portals were built using custom templates (BYO template)
- » TechForce team worked with customer's Enterprise Architecture team in building solution design and high-level architecture
- » The new customer portal provided a (B2C) self-service capability

## Outcomes & Benefits

- » The new customer portal provided a smart and straightforward platform.
- » Insurance agents engaged in more rewarding customer conversations and, reviewed and researched customer information (B2B).
- » Complete view of each policyholder with agents to deliver personalised and relevant recommendations.



# Creating an 'Enhanced User-friendly Experience' for A 'Citizen Govt. Portal'

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## Key Challenges Faced

- » Change in legislation required the Portal to be rebuilt from its earlier state
- » The system supported both external users to interact with data and internal users to review, process and update disclosure information
- » To enable search and filter for stakeholders based on different input criteria and existing support in legacy portal
- » Ability to select any stakeholder and view summary and details of disclosure information from search results



## Solution Provided

- » Solution provided was multi-faceted requiring new solutions for Design, Functionality and Performance
- » User interface for new platform was re-designed from scratch to support custom and enhanced search, data analysis, and visual representation
- » End product had much improved UI with better visualisation and faster site speed

## Outcomes & Benefits

- » Delivered greater capability, better user experience, web accessibility implementation, device and browser compatibility
- » Delivered capabilities to publish pre-election disclosures and half-yearly disclosures, with significantly improved stakeholder experience

# 'Salesforce Integration' for A 'Leading Event Management Company'

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## Key Challenges Faced

- » Company's Partner Community Portal built on legacy framework with functional limitations, devoid of visual appeal and with broken features
- » Need for a framework that seamlessly integrated to customer's Salesforce CRM and supported new components to make it visually clean, appealing with new branding

## Solution Provided

- » Project Discovery: Played a key role in the project discovery phase where the business realised its enhanced process. Identified the components and proposed different alternatives
- » Strategies: Decision made based on requirements of implementation technique. Identified latest Salesforce Lightning Components with Community Builder, offering a simple and visually impacted approach
- » Implementation: Popular Cloud-based CRM (Salesforce's Lightning Component) used to implement and design the portal, and successfully deployed

## Outcomes & Benefits

- » More user-friendly and visual-friendly UI, with new branding changes for the portal
- » All broken features were fixed and working as expected
- » All approval processes well-integrated as expected
- » Identified and removed all unwanted components in the portal

# Data Capturing & Performance Analysis' Using Salesforce for A 'Leading Manufacturing & Distribution Company'

## Key Challenges Faced

- » With vast reseller and distributor network across Australia, data flow from resellers to business was unstructured
- » Lack of consistency and inability for sales and operations teams to perform analysis and insights
- » Low efficiency for sales and operations team due to lack of clear insights from master information received from seller network

## Solution Provided

- » Worked closely with business teams to understand current processes and requirements
- » Identified gaps in current process and provided solution to blend three critical pillars of success: People, Technology and Processes.
- » Created the right data model
- » Enabled efficient data capturing mechanisms
- » Introduced consistency in building reports and dashboards for data analysis
- » Much-needed insights to Sales and Operations team through visualization

## Outcomes & Benefits

- » Improved customer's performance with data consolidation
- » Delivered better data insights for sales management team
- » Amplified adoption of Salesforce platform
- » Business improved user productivity and amplified its confidence in using Salesforce solutions flawlessly and efficiently
- » Customer increased their ROI by 3X after Salesforce implementation and guided user adoption methodologies



# Our Customers' Success is Our Success

We engaged Techforce teams for a fairly complex Salesforce project for our lease management. Our experience of working with them has been flawless and systematic. They are a team which is well organized and super approachable.

**Maria Gregorio**

Techforce Services has been an excellent partner to work on our implementation and on-going improvement and maintenance phase. They have consistently proven their value to execute and deliver to our wishes.

**Adam Hudson**

TechForce's expertise and timeliness are always top-notch. We couldn't wish for a better partner. They have a extremely knowledgeable team, so proactive and above all they have helped us to drive fantastic results for our business. I can highly recommend the TechForce Team.

**Sai Sneha Narkedamilli**

Techforce Services have been a pleasure to deal with. They have deep technical expertise, and they provide excellent customer service. I highly recommend them.

**Marina Tcholakova**

Engagement with Techforce has been highly satisfactory and recommended. Their profound knowledge in salesforce and its products have been really impressive.

**Kelvin Lam**

Techforce worked effectively to understand the engagement and deliver the outcomes we needed. They worked independently and kept everything on track.

**Marina Tcholakova**

Ready to accelerate your Salesforce Journey with TechForce Services? [Consult with us](#)

## About TechForce Services

TechForce Services is an Australian Salesforce Consulting company with 100+ certifications and 50,000+ hours of delivered project work. It was founded by Vamsi Krishna Gosu. Vamsi is a Salesforce MVP, Certified Force.com Developer, a 'Hall of Fame' member, and official member of the Forbes Technology Council. He has 20 years of experience in professional software development (Cloud, Web, Enterprise). His specialities include Salesforce (Lightning, Apex, Visualforce, SOQL) development, Microsoft.NET Technologies and Web Development. This year, CRN Fast50 ranked TechForce Services 18th among the fastest-growing IT companies in Australia as against 20th in 2019.