

Energy & Utilities Success Case 1

ProcessClick – Your Agile BPM for Salesforce



INTRO

As an industry agnostic product ProcessClick fits with every kind of needs, and customers all around the world relies on its capabilities to achieve business goals. The following success case describes a project wherein ProcessClick has been used as a helpful solution in order to solve a particular challenging situation.

PROJECT

The business area related to the project, or the customer application context, was the smart digitization and integration with Public Administration for an Energy & Utilities client. The customer is a leader in the sale of electricity and gas commodities. The main business challenge of this project was the sales processes management for electricity and gas services, and tenders on the Salesforce platform.

THE CHALLENGE

The main challenge was about the standardization of varied and non-normalized business processes such as the 360-degree management of tenders with important public entities: in particular, it was also necessary to track the provided services related to the post-sale of these contracts. Another important aspects to be considered about this project were the variety of business processes to be designed, managed and streamlined, the integration with external systems (documental, invoice, etc.), the tracking of business processes that were previously in charge of human actors and not automated, not regulated nor standardized by established procedures (internal to the company or dictated by law).

THE SOLUTION

Started in 2019 and ended one year after, ProcessClick has supported the client in achieving its business goals related to the design, management and control of business processes for customers and public entities. Since there was no possibility to only leverage the native capabilities of the Salesforce platform, the project was born thanks to the presence of ProcessClick, that has extended the capabilities of the already existing systems. ProcessClick has been inserted in an articulated and varied context, setting it as a single point of control and management of the business processes, allowing to automate, streamline and track in a precise way all the changes and stages of the processes themselves. The versatility of the product allowed business needs to be adapted to all the specific use cases required: from the design of processes, to the implementation and control of the data flow on the Salesforce platform, to the integration with third-party systems.



RESULTS

The benefits gained by the customer, in terms of impacts stemming from the adopted solution are:

- standardization and efficiency of complex business processes
- centralization of process management in a single system
- point-and-click process design, reduced configuration time
- proven methodology for structured process design
- native integration with external Salesforce systems

CONTACTS

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