Lightning Transition & Sales Process Optimization

Customer Overview

As a restaurant and entertainment arcade chain for adults and families, providing a delightful guest experience is core to our customer's business, from food, drinks and games in an amazingly fun environment to the reservation process to get there.

Challenge

Our customer's team manages sales (including leads and opportunities), sales budgeting and sales report generation from within Salesforce. The team had been using Salesforce Classic and engaged another Salesforce partner to help port everything, from out-of-the-box sales processes to custom development, to an upgraded instance with Lightning support. Unfortunately, there were issues with this first migration that needed to be addressed. The team also needed help to introduce additional improvements to their sales and online event booking processes.

Solution

Our expertise allowed us to resolve the issues created during the first migration and successfully migrate the team to Salesforce Lightning.

We began our engagement by repairing the data structure. From that point, we worked with the team to reconfigure their Salesforce org to support the new data structure and enable the ability to easily enhance features using the Salesforce platform in the future.

Beyond basic Salesforce administrator work, we expanded the capabilities of their Sales Cloud instance. For example, we updated a direct booking application integrated with their website which allows their customers to easily book and pay for private events. To further streamline the booking process, we developed a Lightning Component to validate event price quotes against the reservation requirements, triggering an email to the event salesperson and customer any time there is a variation in price or requirements. We additionally built a Lightning Component to allow the team to preview, in Salesforce, emails automatically sent to customers with tasks associated with private event bookings.

To assist with internal reporting, we built a small web app for Sales Cloud to allow the team to easily generate a specific type of sales report used widely across the organization. We also developed tools to generate reports with data specific to each event salesperson, detailing their cost and time efficiency.

To build all of these features, our developers used Apex, Visualforce Lightning Components and our Salesforce administration skills.

Results

The result of our partnership has been an increase in productivity for our customer's team. They now have a fully functioning Salesforce org they can expand upon easily as they grow. We now provide long-term Salesforce administration services to this customer and have since worked with their team to optimize integrations with several third-party companies including Sertifi to enable online payments and XfilesPro to export Salesforce files and objects.