

Case Study: Private Lender Salesforce Setup

Background

The customer is private lender based out of Chicago. Their primary geography of business was in and around Chicago. They had been using Salesforce for few years, but were not able to get good return on the investment, due to inefficient implementation of Salesforce.

They hired Aspire to revamp their Salesforce instance and implement various automations and integrations with external application.

Challenges

- Higher cost of using some AppExchange apps
- Everything was visible to everybody in old setup, exposing risk of data theft and wrong updates
- Given the competitive nature of private lending industry, no lag should happen in communications to their clients. Any lag could result in loss of deal.
- The customer wanted to continue using their current setup while new one is rolled out
- Current setup was done using old technologies like VF Pages, Salesforce classic
- The customer's staff needed to be trained on lightning and relevant features.
- Since they were dealing with people and investors' money, they did not want any error related to various currency calculations while updating current implementation.

Solution

We allocated a team of experienced developer led by an architect to study current setup and find out where the improvements were needed.

We did following updates to their Salesforce to get rid of all major pain points:

- Implemented Lightning wherever possible, which allowed building rich record pages for various types of objects.
- Built record pages to give flexibility and organize data in better ways.
- Replaced few AppExchange apps with custom implementations that saved lots of \$\$\$ for customer.
- Corrected Security via Roles, Profiles, sharing rules etc to ensure data is visible only to required set of people.
- Leveraged Apex to automate many of their existing business processes and most of the new business processes.
- Provided a support during US daytime in order to resolve any critical issues so that client communications don't get delayed.

Achievements

As a result of updates to their Salesforce, the customer was able to expand their business to almost every state of the USA.

Their team has grown from 10 people to almost 100 people on Salesforce and many more who are not working on Salesforce.

The revenue increased from mere \$5 million to more than a \$1 billion.