CUSTOMER FROM OIL & GAS INDUSTRY
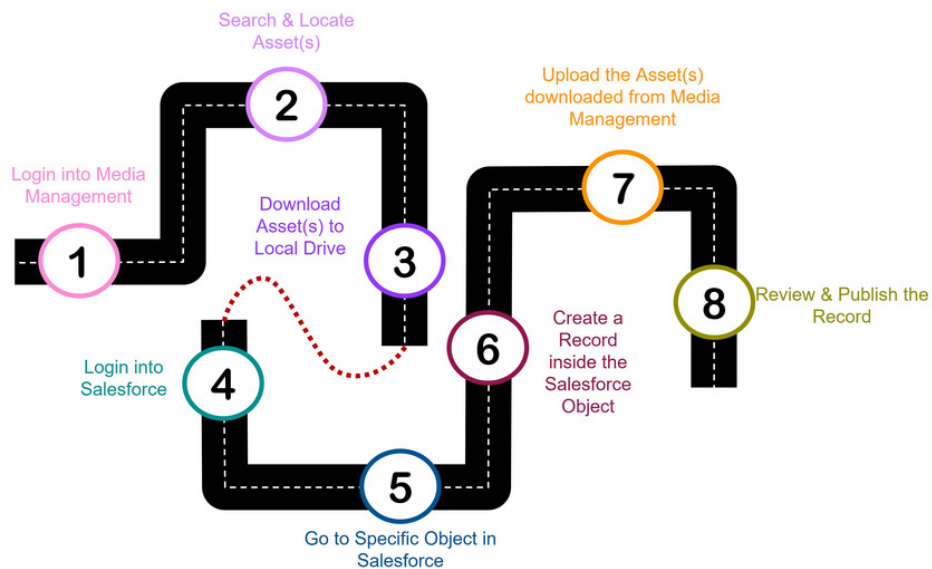
ACHERON

The client is an American multinational energy corporation predominantly in oil and gas

BACKGROUND

Customer is a big time Salesforce user and manages all their digital assets on OpenText Media Management. They also use Salesforce Experience cloud for creating and sharing articles around their products, services and company updates to their stakeholders. Salesforce has beautifully aligned Salesforce Sales Cloud and Experience Cloud such that articles can be created as records inside Sales Cloud and published across sites built and managed by the Experience Cloud

Scenario without SFDC connector

1 — Login into Media Management
2 — Search & Locate Asset(s)
3 — Download Asset(s) to Local Drive
4 — Login into Salesforce
5 — Go to Specific Object in Salesforce
6 — Create a Record inside the Salesforce Object
7 — Upload the Asset(s) downloaded from Media Management
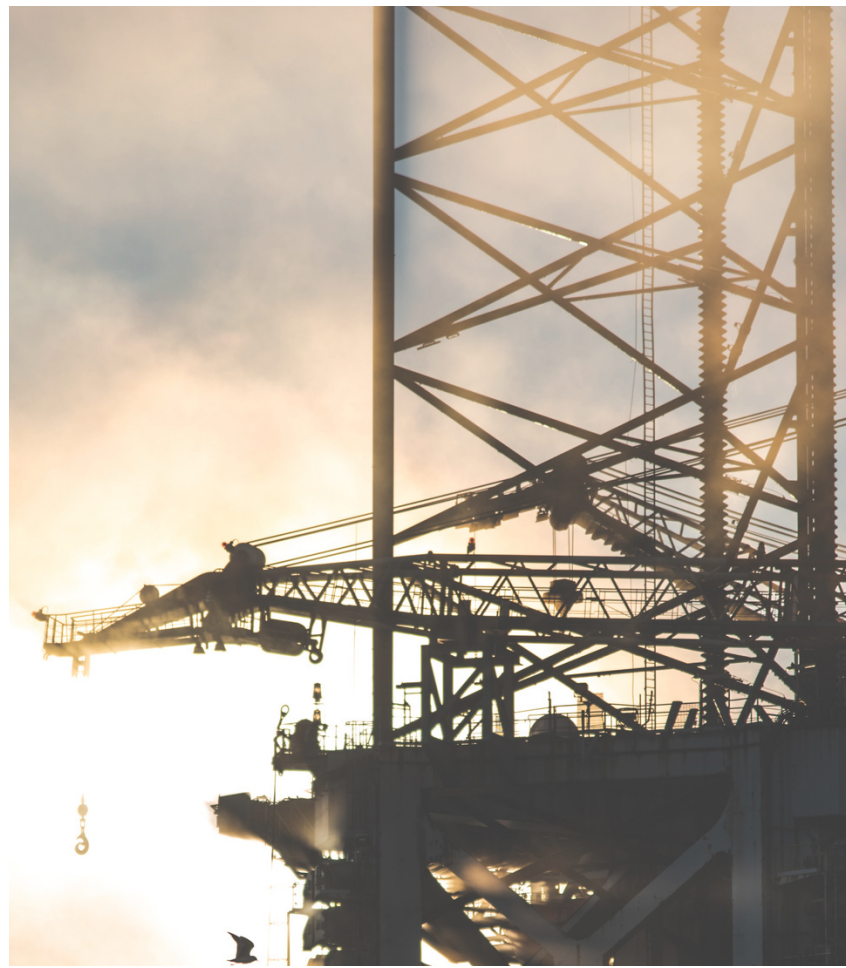8 — Review & Publish the Record

PAIN IN THE NECK

In this Digital Era, articles without digital media are definitely plain and boring. So the business users had to download branded assets from their OTMM and then include those assets as part of their articles created in Salesforce, to make them more appealing and get a better reach. This was tiring as the Salesforce users had to sign-in into both Salesforce and OTMM and switch between these two applications. Further, downloading from OTMM and uploading into Salesforce disconnected the digital asset from OTMM, thereby breaking the continuity chain if any updates were made later to the digital asset in OTMM, not being reflected in the articles where the same digital asset had been used. Also importantly, the user experience of both these applications were completely different, thereby increasing cognitive burden on the team that were creating those articles.

WHAT ACHERON BROUGHT TO THE TABLE

Acheron proposed the SFDC OTMM connector so that Salesforce users can access the OTMM assets directly from within their Salesforce application, and insert assets either as hyperlinks or as images as may be required inside the articles that they are creating. Now this resolved two big challenges - First, the user need not sign in multiple times into multiple applications. Single Sign On takes care of authenticating users to access those applications based on the configured roles and permissions. Second, the Salesforce users were within the more familiar Salesforce user experience and still being able to access and consume the branded assets that were published on OTMM.
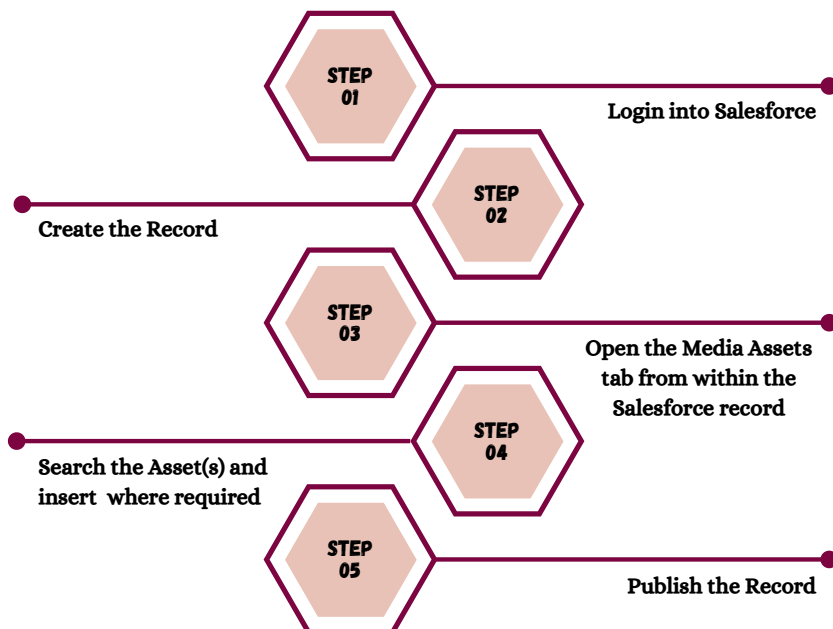
Acheron collaborated with the customer's IT team and supported in deploying the connector on their containerized cloud environment to ensure smooth operation of the integration. The customer went live and is now happy with the integrated application.

Current scenario with SFDC connector

- STEP 01 — Login into Salesforce
- STEP 02 — Create the Record
- STEP 03 — Open the Media Assets tab from within the Salesforce record
- STEP 04 — Search the Asset(s) and insert where required
- STEP 05 — Publish the Record

BUSINESS IMPACT

The business users were able to focus on creating appealing articles within lesser time since they did not have to switch between two different applications. This further reduced the cognitive load as well since they had their familiar Salesforce User Experience. Overall, they were able to create better articles within shorter time frames and were able to launch campaigns much quicker. Branding compliance had been taken care of by OTMM and hence no hassle of compliance or penalties. Since all assets had been directly consumed from OTMM (Single Source of Truth), the question of version control and obsolescence of branded content was also effectively managed.

To know more about our connector

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