Reconfiguring And Customizing Sales Cloud To Automate Customer Data Consolidation For A Global Asset Management Firm

Client Overview

A regulated and licensed financial services firm, MPW Capital Advisors Limited focuses on Principal investing activities and outsourced investor relations. Located in the USA and Abu Dhabi, the client manages personnel with a combined experience of 190 years in operating at the brokerage and investment banks located on Wall Street. Likewise, the client also boasts more than 80 years of combined experience in operating at Morgan Stanley and Goldman Sachs. Leveraging its experience in the USA and MENA markets, the client aims to become a group of leading asset managers.

Business Needs

Being part of its everyday business, the client organizes multiple meetings and events for its asset managers, clients, and investors to discuss its diverse product portfolio. However, the client was struggling to track the outcomes and ROI of those events, activities, and tasks. Besides, the client did not have a sure-fire way of capturing the minutes of the meetings; it relied on the inconsistent notes shared by attendees through emails. The client was already using Salesforce Sales Cloud for managing its customers, investors, and asset managers. With the help of Sales Cloud, the client was trying to capture the interactions the stakeholders were having across their business units. However, it was unable to capture the data accurately and required to customize multiple Salesforce objects. To summarize, here are some key business needs that the client wanted to meet through an engagement.

- **Optimizing the existing Salesforce system from end to end to capture mission-critical business data smoothly and accurately**
- **Automating key business processes by tailoring Salesforce objects according to business requirements**
- **Customizing multiple Salesforce objects to manage the relationship with investors and internal audiences more effectively**
- **Creating a dedicated profile for investors on the Salesforce Sales Cloud based on their organizations, company overview, products, recent activities, etc.**

Strategy & Solution

As the client wanted to optimize the Sales Cloud for managing its account and contacts better, it required a strategic Salesforce partner. The partner was required to have a thorough understanding of different Salesforce products. And our Salesforce team fitted that bill. Our team of Salesforce experts began understanding the extent to which the client was using the Sales Cloud platform. That is how our team was supposed to manage its internal and external audiences, including allocators/investors, third-party contractors, and asset managers.

After strategizing with the client's business team, our Salesforce specialists decided to create multiple views for quickly fetching the data. We divided the solution into two parts: Salesforce configuration and Salesforce customization. Besides, we tailored Salesforce for maintaining products; for instance, we programmed Salesforce to ensure that the names of the products were auto-created based on the selection of different options depending on the account type.

We even customized Salesforce for improving activity management outcomes. We enabled the client to use Salesforce for maintaining the interactions with customers to get things lined up on top priority. We not just tailored but even automated the creation of different activity types, including adding attendees and products, sending emails, capturing the replies alongside MOMs and comments, and consolidating them for easy review. On top of that, our developers created a one-pager profile in Sales Cloud that would automatically capture the details of the investors that were ready for meetings or discussions. That way, we helped the client pursue leads more effectively and on time. With the help of detailed activity management, we helped the client get actionable insights into investor bios. That way, the client gained a strategic heads-up and started preparing meeting decks for seamlessly advancing the lead into the corporate sales funnel.

As part of the Salesforce configuration, we created custom objects, adding fields, profiles, record types, and page layouts. That way, we helped the client track the data and information that was unique to its org. We also went ahead with configuring emails and creating templates that streamlined sending emails with preloaded fields. Moreover, we customized different fields and objects of Salesforce. That is how we helped the client capture unique data that was not being captured by the standard fields of this cloud-based software. Besides tailoring the fields in Salesforce, we even customized the activity objects to prioritize tasks seamlessly and keep up with different accounts, campaigns, opportunities, and leads.

Our Salesforce developers wrote Apex code and used Triggers to automate activities and flows. By taking these steps, we helped the client embrace a new level of Salesforce-enabled automation. We even improved the data quality and accuracy by establishing different validation rules. We also leveraged Salesforce Email Services for sending emails, capturing replies, and consolidating the datasets in an object. Moreover, we customized the Sales Cloud to export data from the existing org, format the data according to the new implementation, and import the existing datasets with past archives.

User Experience

As the project involved heavy customization, we wanted to revamp the user experience so that it could lead to better data-capturing capabilities and to improved decision-making. To that end, we leveraged our VisualForce development expertise to make navigation more dynamic, more usable, and user-friendlier than ever. Here are some of the key highlights of the add-ons that we introduced to the client's Sales Cloud by heavily customizing it.

- Built Lightning pages that would improve the richness of the UI
- Improved the inductivity of the UI by customizing multiple fields, objects, and page layouts
- Tailored the investor profile pages to capture the data smoothly and accurately

Architecture

Besides tailoring the client's Sales Cloud experience, we modified the architecture from end to end. That way, we not only made the UX more intuitive but also added to the robustness of the Salesforce Solution that the client was using. Here are some of the key highlights of the tweaks that we made at the backend of the Sales Cloud solution.

- Brought the next generation of automation by using Flows, Triggers, and Process Builders
- Set different validation rules for improving the quality of the data being captured
- Leveraged our Apex code capabilities to add Salesforce Email Services; that way, we helped the client capture the replies from investors more effectively
- Integrated the existing Sales Cloud solution with Braintree payment gateway to make transactions secure and smooth

Development Process

Like every other project, we followed the agile development methodology to complete this Salesforce project. After initial discussions with us, the client deiced on bringing our Salesforce developers on board. These developers carried out the detailed customization and configuration tasks as per a planned schedule. As we were following an agile methodology, we ensured that the client viewed weekly demos. Based on these weekly meetings, we gathered the client feedback to further fine-tune the quality of the deliverables. Here are some of the key highlights of the development process that we followed to put this project from paper to the real world.

- Initiating multiple rounds of discussion to work out the details of Salesforce configuration and customization
- Aligning the project goals with our Salesforce expertise
- Onboarding our Visualforce developers and Apex programmers
- Carrying out daily stand-up meetings to ensure every stakeholder is on the same page as far as deliverables are concerned
- Providing ongoing maintenance and support for the project

Business Outcomes

Once the configuration and customization initiatives were executed successfully, the project was up and running and ready to deliver benefits. The implementation of the customized and newly configured Sales Cloud enabled the client to introduce new-age automation processes. These processes, in turn, streamlined business units from scratch. Here are some of the benefits that the client reaped once the tailored and newly configured Sales Cloud was implemented.

- Customized activities and tasks to automate and streamline businesses process
- Introduced automation that reduced the manual efforts to find and consolidate the MOMs by 6 hours per activity
- Improved the visibility of the client for different accounts and details so that it can advance lead-nurturing nativities more effectively
- Developed a one-pager investor profile that was populated with ready-to-use data that helped prepare meeting decks, reducing the manual effects by 80%

Client's Speak

“ ***Cloud Digital's Salesforce team has been more of a growth partner and less of a technology vendor. We have been so satisfied that we have given the team a one-year maintenance and support contract as well.*** ”