Girikon Salesforce Case Studies
Choice Hotels

![Girikon - IT Around the Globe]

www.girikon.com

The Background

Choice Hotels, headquartered in US, is Hotel chain owning Hotel Brands with properties based in US and Canada.

Girikon was engaged with Choice Hotels as an Implementation Partner since 2020 to automate their Hotel Sales and Franchise Business processes using Salesforce Platform. Their main objective was to bring everything under one umbrella i.e. Salesforce and support their Franchise Partners and Planners effectively. Girikon being an Implementation partners worked with Choice Hotels to make their processes smooth in Salesforce by developing multiple projects using different Salesforce Products and MuleSoft.

Business Scope

- Salesforce Sales Cloud – To Setup and Implement Overall Sales Strategy to Onboard Hotels and Franchise
- Salesforce Experience Cloud – To Setup and Implement the Franchise and Planner Management System
- CVent – To get the Hotels data into Salesforce
- Salesforce Pardot– To Setup Email Campaigns and Lead Automation Process

Products Used

- Salesforce Sales Cloud, Experience Cloud, Pardot, Mulesoft

Approach and Key Features

Salesforce Sales Cloud – Girikon was engaged with Choice Hotel to Implement and Support their Overall Sales Process such as:
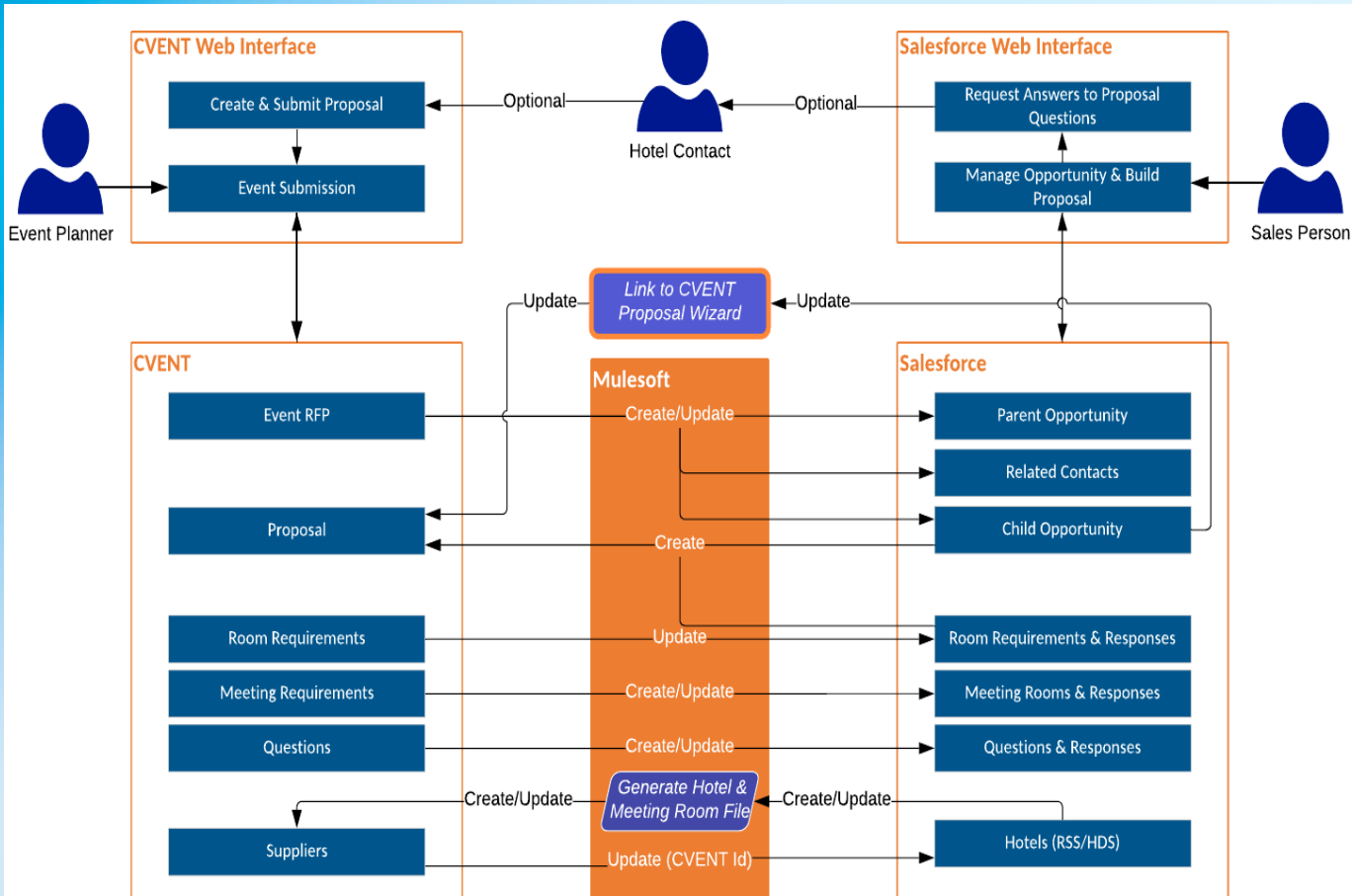
- A new opportunities (Group Project RFP - Opportunity) is created in Salesforce for a new Franchise Hotel addition.
- Flow was implemented in Salesforce to create Hotels and opportunities.
- Developed integration with Third Party Hotel Management Software using Mulesoft to get the data for new opportunities / hotels in Salesforce.
- A Project Intake form wizard (LWC application) is used to create Group RFP, Parent RFP, Hotel RFPs.
- After all information is received, flow automations were initiated for creating RRRs records for Parent RFPs and sending Emails to Onboard the new hotels.
- LWC application was developed for Sales Users to download excel template that indicates order of columns as well as format of data (for example: MM/DD/YYYY for dates).
- LWC application was developed to provide a one-time text area that users can use to paste data from spreadsheet into that text area, which vanishes after data is pasted so that users don't mess up pasted data after they are populated in data table in Salesforce.
- Once data is there is a proper sequence, we used tab(\t) to differentiate between field values and newline(\n) to differentiate between new records, which enables us to do preliminary validations such as dates are in a proper format and end dates are greater than start date.
- Records Validation has been developed as per given criteria and show error messages in an error column. Error column functionality is achieved using two data tables, one with error columns and other one without error column. Depending on the error we can decide which table should be shown.
- Use conditional formatting to change the color of error cells to red.

Salesforce Experience Cloud – Franchise and Planner Management System was developed in Experience Cloud with features such as:

- Post Onboarding, Franchise and Planners can view their details in the Portal.
- They can accept / reject / modify the RFP details
- They can send the emails to the related hotel contacts.

Mulesoft – Used MuleSoft as Middleware to integrate Salesforce with third party application such as Cvent, HDS (Internal Hotel Management Software)

Pardot Setup:
- **Business unit end to end setup :-** Syncs real time data & the sales people get real time insights on leads
- **Automation Rules:-** Save choice time before that they use to send manual emails
- **Engagement studio setup for bulk email sending :-** Now they have pre created emails automation for their future events
- **Responsive content creation (forms/email templates):-** get more response from their prospects
- **Build lead nurturing programs:-** reduce the time to send one on one email
- **Sales engage tool configuration :-** Salesforce users can use AE content from their salesforce screen without switching their current SF interface
- **Training document :-** Helps team to follow the right process
- **Scoring model setup:-** Get the potential lead data which directly syncs to SF

Result

- Efficient On boarding of new Hotels with implementation of Intake Form Wizard.
- The global sales application process for new Hotels got more simplified.
- Enhanced Personalized Experience for the Business Development to onboard new Hotels and bookings.
- Users can download the provided template and prepare data for insertion.
- Multiple records can be created without using dataloader or import functionality.
- Users can edit data after pasting all records in one go.
- No admin privileges required to create multiple records at once.

CVENT Opportunity Process - Future State

Emily Hillis | June 16, 2020
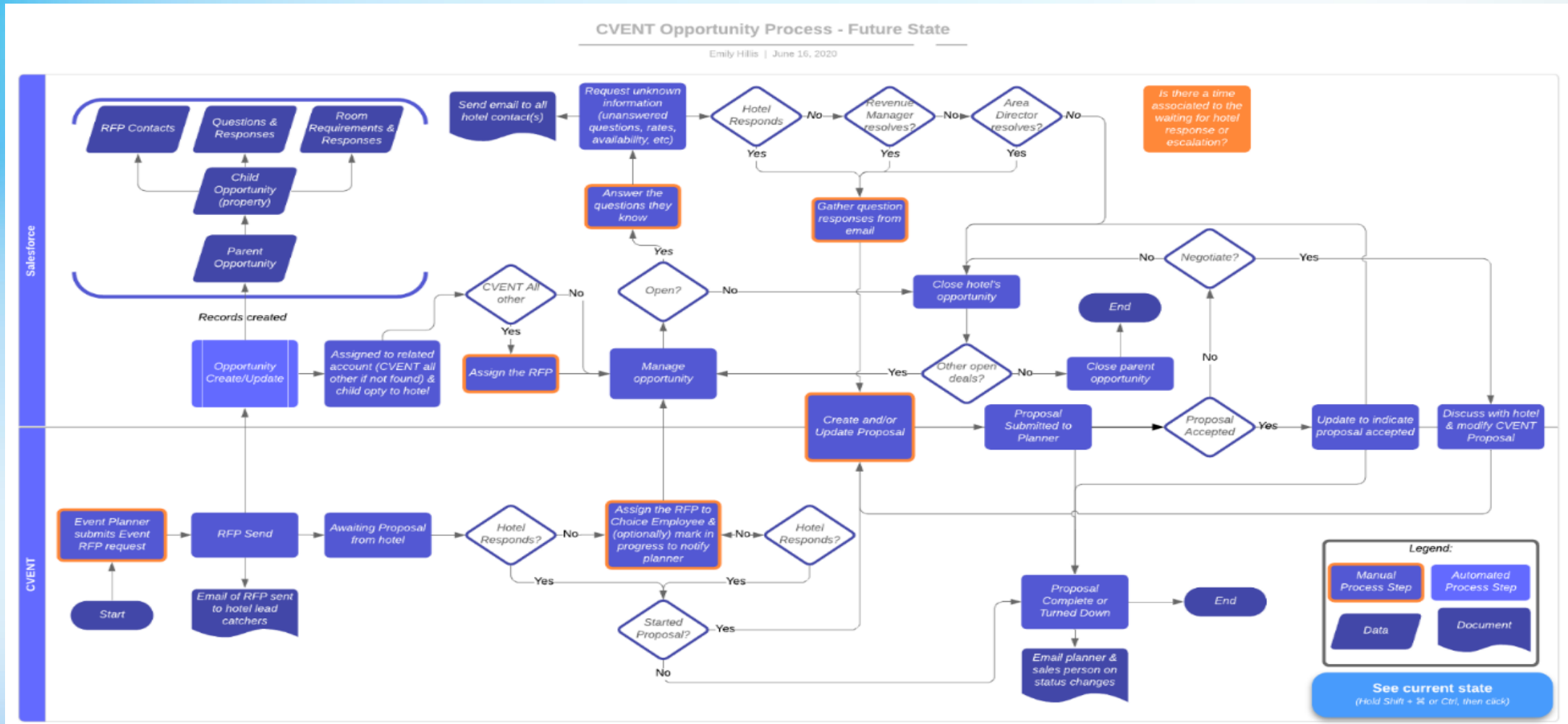
THANK YOU!

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