



Case Study: FTAI (Freight Transport Association Ireland)

1. **Project Name:** Automation and streamline Data Flow between FTAI, CDAP and LAA team
2. **Products:** Enterprise Salesforce Edition
3. **Sector:** Logistics
4. **Engagement Type:** Advisory Services, Implementation, Support, Training and Documentation Guides
5. **Managed Services Specializations:** Advisory Services, Support, Training, Implementation with Training and Documentations
6. **Number of Users:** 7 Users
7. **Go Live Date:** Mid-April 2024

	<p>FTA Ireland (Freight Transport Association Ireland) is a leading organization dedicated to enhancing the safety, efficiency, and sustainability of logistics across Ireland. Established in 2010, FTA Ireland encompasses all facets of private and public freight transport, passenger transport, and logistics supply chain, spanning road, rail, sea, and air. Representing some of the largest freight and passenger operators in the country, FTA Ireland boasts over 25,000 employees and 10,000 commercial vehicles collectively. Their mission is to deliver excellence in transportation while prioritizing safety, environmental responsibility, and operational efficiency.</p>
Nature of Contract	Business
Project Duration	04/04/2023 to 12/04/2024
Contact Name and Reference Details	Tonya Grace
Project Description	Automation of data flow, Web to Lead forms for sites, Membership Form in force.com, Training Certificate Generation and reports.

8. **Services Provided:** TechStorm analyzed the business process and the working of FTA Ireland and derived solutions to automate and streamline the process such that the Leads coming from FTA, CDAP and LAA websites through forms are captured directly into salesforce so the internal staff members can get benefit out of this. So, the Sales cloud was configured accordingly to cater for their needs and the customizations are developed wherever necessary using salesforce features.

We have identified the issues with all their manual processes that are used to store Account and contact information in Excel, manual emails for sending newsletters and Training services and courses offered, certificates for the services provided, and progress monitoring reports.

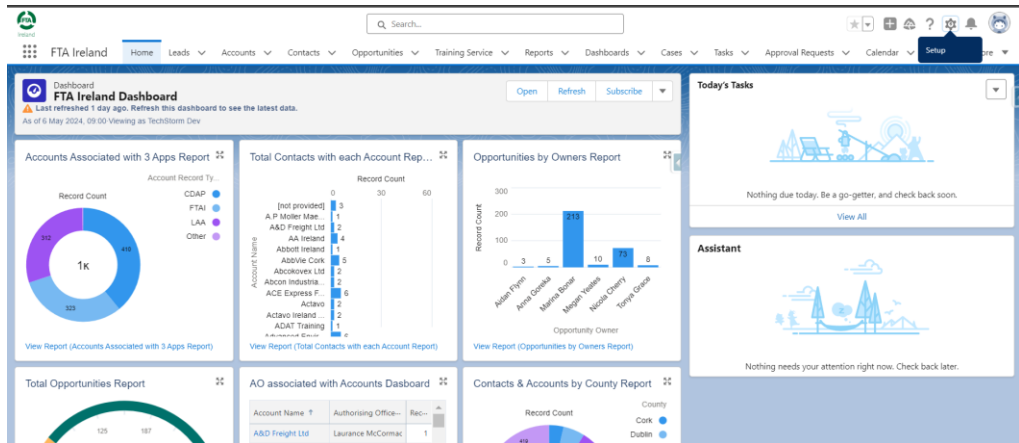
TechStorm team provided solutions to address the gaps mentioned above.



- A. Establish hierarchy, roles, profiles, and sharing rules tailored to FTAI's organizational structure and team requirements for FTAI, CDAP, LAA. Set up sharing rules and access levels to manage data sharing and view access efficiently.
- B. Review data sheets to finalize the CRM data model for FTAI CDAP and LAA Team, including creating custom objects.
- C. Align key sales processes such as Opportunity Management, Account Management, and Lead Management with FTAI's business processes. Configure account hierarchy, leads for online inquiries (Web To Lead), and contact roles.
- D. Streamline opportunity stage progression and set up workflows and email alerts (internal and external email).
- E. Facilitate Product Management by mapping membership and price-book entries, configuring the Salesforce Product family, and setting up workflows and email alerts.
- F. Manage Activities by configuring tasks, events, and emails as per FTAI's business needs. Develop a native force.com form for membership registration, seamlessly capturing inquiries into salesforce and converting them into Member Account and Contact.
- G. Ensure smooth Data Migration from current sources to Salesforce, focusing on Contacts and Accounts. Import data for accounts and contacts to ensure comprehensive record management.
- H. Phase 2 entails Course and Trainer Management, including configuring trainee records and providing a customized solution (out of box) to generate certificates for selected trainee contacts via email for the given Training Certificate template, auto email alerts, and activity capturing.
- I. Implement Case Management processes and customize certification templates for generating PDF certificates automatically upon course completion.
- J. Develop reports and dashboards tailored to FTAI's business needs, providing senior management and the board with insights via home page dashboards.

Some of the features implemented by TechStorm have been mentioned below with screenshot of the feature.

1. Dashboard when logged in as admin, in admin view we can access all three applications such as FTAI, LAA and CDAP records. If logged in as FTAI User we can see only FTAI-related dashboard data.



2. Force.com developed site, Membership form filled is directly captured in salesforce as lead which can be reviewed and converted to Contact and account with respective details.

The screenshot shows the FTA Ireland Membership Form. The form is titled "MEMBERSHIP FORM" and includes the following sections:

- Company Details:** Fields for Company Name, Trading Names (If Any), Company Address, City/Town, State/Province, Eircode, Country, Company Registration Number, VAT Registration Number, Website/URL, and Nature of Business.
- Number Of Vehicles Operated:** Fields for Large Commercial Vehicles (>3.5t), Vans (<3.5t), Passenger Carrying Vehicles, and Total Number of Drivers.

3. Apprenticeship and other training enquiries from the website are captured in the salesforce.



Convert Lead

Account - OR - ☐ Choose Existing

☒ Create New

*Account Name
Store All

Record Type
FTAI

☒ FTAI
☐ LAA
☐ CDAP

Account Search
Search for matching accounts

Contact - OR - ☐ Choose Existing

☐ Create New

No active duplicate rule

☐ Choose Existing

To find opportunity, choose an existing account

Opportunity - OR - ☐ Choose Existing

☒ Create New

Store All-

☐ Don't create an opportunity upon conversion

☐ Choose Existing

*Record Owner
Nicola Cherry

*Converted Status
Qualified

[Cancel](#) [Convert](#)

4. From the Account we have 360° views of all the contacts related to that account along with training services provided and opportunities associated with the account

Sandbox: FTAI/DEV | Log out

Search...

FTA Ireland

Home Leads Accounts Contacts Opportunities Training Service Reports Dashboards Tasks Approval Requests Calendar Chatter Email Templates More

Account Primeline

Related Details

Service Contracts (0) [New](#)

Opportunities (0) [New](#)

Contacts (5) [New](#)

bob proctor
Email: sireesh.p@techstorm.ie
Training M...

bob test
Email: sireesh.p@techstorm.ie
Training M...

JIMMY CHOO
Email: sireesh.p@techstorm.ie
Training M...

john test
Email: sireesh.p@techstorm.ie
Training M...

Tonya Grace
Email: sireesh.p@techstorm.ie
Training M...

[View All](#)

Training Service (1) [New](#)

Training Service Name	Course Name	Booking Contact	Trainer Name
FLEET	Annual Data Sim Card Charge for downl...	Charlie Ansa	Donncha Cody

Activity Chatter

Filters: All time • All activities • All types [Refresh](#) [Expand All](#) [View All](#)

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

* = Required Information

Training Details

*Training Service Name
Safe and Secure Load Training

*Account Name
Primeline

*Course Name
Safe Load Securing Training Member

*Booking Contact
bob proctor

Key Training Contact
Search Contacts...

*Trainer Name
Donncha Cody

Training Start Date
*Date: 24/04/2024 *Time: 12:00

*Training Description
Safe and Secure Load Training

Attendance Record
Show

Cost
€0.00
This field is calculated upon save

Total Amount

Course Number
CN67678

Reference/Code
This field is calculated upon save

Booking Contact Email
This field is calculated upon save

[Cancel](#) [Save & New](#) [Save](#)

5. Booking confirmation email sent to the booking contact email

Booking Confirmation Form

Company	Primeline
Course	ecodriver training
Date and Time	28/03/2024, 12:00
Venue	
Cost	€45.00

Terms and conditions

All bookings must be cancelled 72 hours in advance. If not, the following charges will apply:

- 24 hours' notice 100% of the cost of training.
- 48 hours' notice 50% of the cost of training.

Please forward PO number in advance if you require an invoice.

For assistance or amendments to your booking please contact:
01 8447516 / info@ftai.ie

Best regards,
FTA Ireland

Sandbox: FTA/TSDEV | Log out

FTA Ireland Home Leads Accounts Contacts Opportunities Training Requests Calendar Chatter Email Templates More

Trainee Attendee Contact "a041X000001d387YAA" was created.

Training Service

Safe and Secure Load Training

Generate Certificate New Note Edit

Related Details

Trainee Attendee Contacts (3)

3 items • Sorted by Account: Account Name • Updated a few seconds ago

	Account: Acc...	Contact: First ...	Contact: Last ...	Contact: Email	Contact: Mobile
1	<input type="checkbox"/> Primeline	jimmy	CHOO	<input type="checkbox"/> [REDACTED]	<input type="checkbox"/> [REDACTED]
2	<input type="checkbox"/> Primeline	bob	test	sireesha.p@techstorm.ie	[REDACTED]
3	<input type="checkbox"/> Primeline	john	test		

View All

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

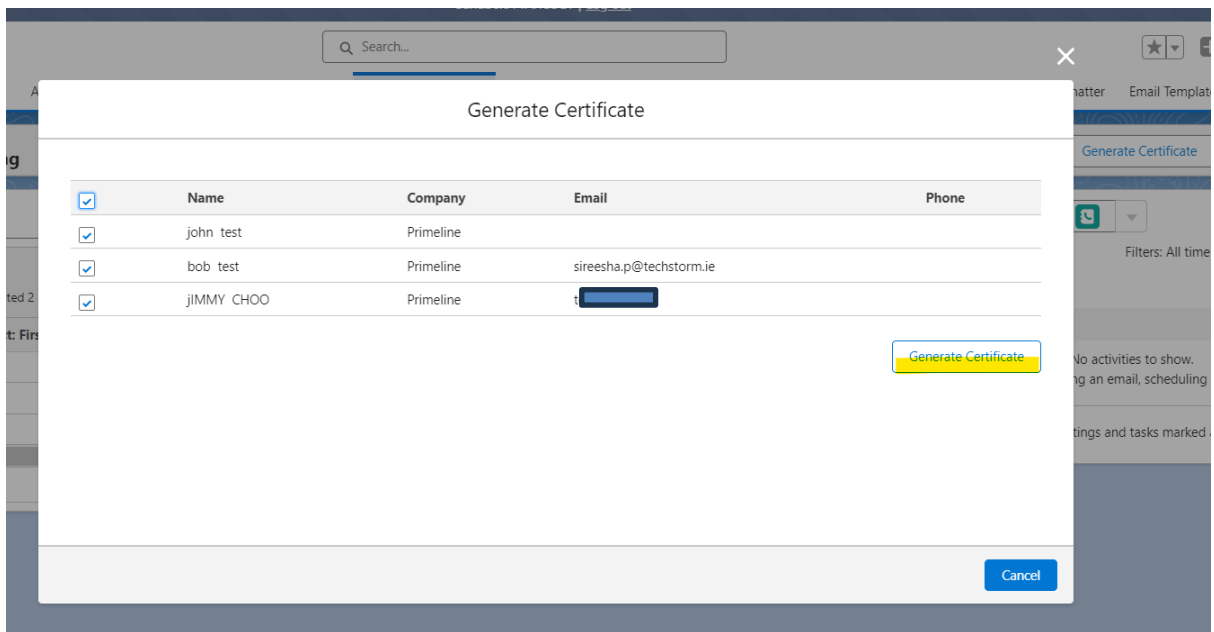
No activities to show.

Get started by sending an email, scheduling a task, and more.

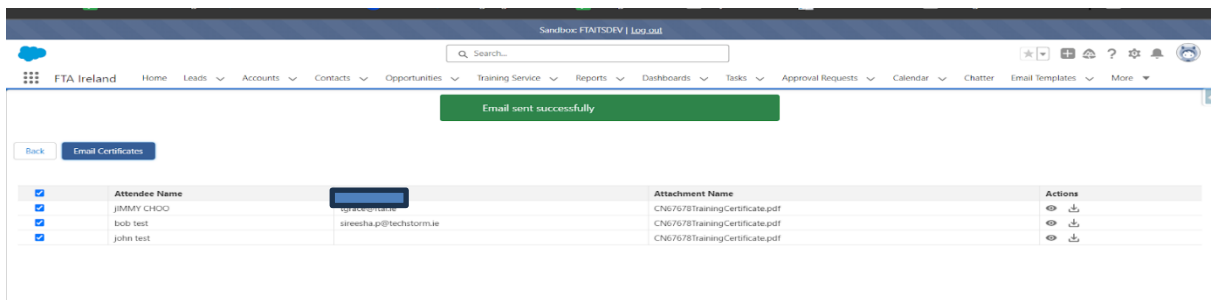
No past activity. Past meetings and tasks marked as done show up here.

6. The checkbox is available to select all or only the contacts you need to generate the certificate.

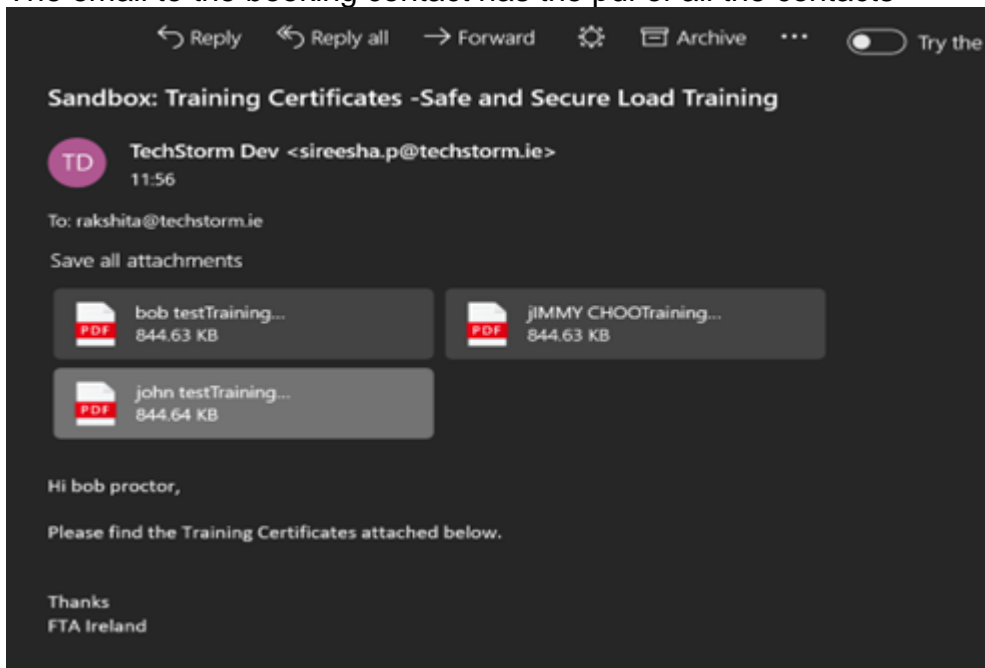
Click generate certificate



7. **Download** icon to download the certificate to your local system.



8. The email to the booking contact has the pdf of all the contacts





FTA Ireland

Home Leads Accounts Contacts Opportunities Training Service Reports Dashboards Tasks Approval Requests Calendar Charter Email Templates More

Search...

Reports

Recent 15 items

Search recent reports... New Report New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Monthly Course Report	Training by month by course name + Total cost + number of attendees	Standard Training Reports(Do not change)	TechStorm Dev	4/4/2024, 15:57	
Created by Me	Training attendees by account by course	Training attendees by account by course name per month	Standard Training Reports(Do not change)	TechStorm Dev	4/4/2024, 17:50	
Private Reports	Expiring Course Report	Training code + expiry + account (to reach out to companies based on nearing refresher required)	Standard Training Reports(Do not change)	TechStorm Dev	4/4/2024, 17:47	
Public Reports	Accounts Training Course Report	Total accounts with training completed per month + total cost.	Standard Training Reports(Do not change)	TechStorm Dev	4/4/2024, 17:23	
All Reports	CPC Course Monthly Report	CPC by module type by month + total cost + trainer associated + number of attendees.	Standard Training Reports(Do not change)	TechStorm Dev	4/4/2024, 17:13	
FOLDERS	CDAP and LAA Report		LAA Reports	TechStorm Dev	15/3/2024, 9:30	
All Folders	Active Members using Training Services		FTA Reports	Megan Yates	21/11/2023, 12:13	
Created by Me	Opportunities by Owners Report		Private Reports	TechStorm Dev	25/10/2023, 13:09	
Shared with Me	Sample Report: Orchestration Run Logs	What orchestration run logs were created and what happened in their associated orchestration runs?	Public Reports	Platform Integration User	10/2/2024, 2:40	
FAVORITES	Current Council Attendees		FTA Reports	Tonya Grace	21/11/2023, 15:48	

- Click to view each report. We have created standard report folder with each report and category.

FTAI Ireland Customer experience of the solution implemented and Salesforce.com user adoption, benefits, about TechStorm work:

What IT problems were you trying to solve at FTAI?

FTAI had no CRM system at all, any client details or information was held on excel spreadsheets, between many different employees and no one had a full understanding of the value of client in its entirety across all services and membership.

What made you happiest about working with TechStorm?

Finally get a CRM system in place – experience & knowledge working with Not for Profits and small businesses

What have you been able to achieve since using Salesforce CRM?

Complete 360 view of our member and non-member database, across all services, streamlined outreach through salesforce and automated training functionality that has reduced administrative time and effort.

What would you tell someone who's considering using TechStorm?

Go for it – great help, always on hand, very responsive, very solution focused, no problem is left unresolved.

How new onboarding system flow implementation would benefit FTAI team and what challenges were you encountering before this implementation?

High manual administration work, gaps in all areas, no full view of customer portfolio, no view of any engagement made

Would you consider adding other products like Pardot (Marketing Cloud Engagement), Experience Cloud for campaigns and end user access to the services offered by FTAI?

Absolutely – would like to discuss as part of phase 3

Is there anything else that you would like to comment on or say about TechStorm or Salesforce CRM?

TechStorm team have been of tremendous assistance in getting our business to an operational standard that now allows us to manage, target and engage our customers, adding real value to both the customer and the business

Salesforce is still an unknown to us in terms of what else we can utilize, we don't know who our account manager is, and have had very little engagement since the initial scoping meeting last year, we do receive emails regarding end of life of various elements of functionality, but someone to explain what this actually means to us, if at all, and more importantly engaging with us throughout the year on any business needs we have.