

Phenoble Case Study

How Phenoble helped businesses to grow



Phenoble Software Pvt Ltd

Enhancing Operational Efficiency







Challenge

- Disconnected legacy systems created data silos, poor cross-functional visibility, and departmental inefficiencies
- Order processing delays, limited customer support responsiveness, and lack of actionable insights
- Manual processes in Zendesk hindered accurate reporting and timely order fulfillment
- Needed a unified system for real-time data synchronization and centralized CRM

Solution

- Implemented Salesforce as the centralized data management and CRM platform
- Migrated from Zendesk to Salesforce Service Cloud, integrating:
 - Email-to-Case for faster case capture
 - Automated case routing using assignment and priority rules
- Integrated Salesforce with the e-commerce backend to unify customer, order, and inventory data in real time
- Leveraged Salesforce's analytics and reporting tools for customer insight and sales performance tracking

Business Impact

-  Instant case creation and automated case assignment
-  Improved operational workflows and support efficiency
-  Enhanced customer satisfaction and faster service turnaround
-  Strengthened brand perception through reliable, data-driven service delivery



Frameworks for Salesforce Scale



Challenge

- SOQL & DML Limitations: Direct execution in Apex caused scattered logic, security risks, and maintenance difficulties.
- Insecure API Interactions: APIs required manual setup for routes, headers, and security, leading to inconsistencies.
- No Centralized Logging, Trigger Logic Chaos, Security and Messaging Framework
- Manual Job Scheduling: Tedious and error-prone job scheduling limited automation and scalability.
- Dynamic Data Handling: No framework for external sync or dynamic object operations led to duplicate logic.

Solution

- SOQL Framework: Centralized query service to optimize filters, joins, and performance.
- DML Framework: Controlled, batched operations with validation and governor-safe practices.
- API Call Framework: Boilerplate-free API creation with automated routing and header management.
- Messaging Framework: Event-driven messages with user, permission, and group validation.
- Thread Framework: One-click batch job scheduling (e.g., 60+ jobs), with pause/resume for async jobs.
- Logger Framework: Standardized logging (error, success, debug) for traceability and auditing.
- Trigger Framework: Single trigger per object with centralized, testable handler classes.
- Proteus Object Framework: DTO-based object-agnostic operations with external API integration.

Business Impact

- 🚀 Performance Gains: Over 40% reduction in SOQL/DML governor limit hits.
- 🛡️ Security Compliance: Permission checks enforced before DML.
- 📈 Scalability: Scheduled in <2 minutes without async limitations.
- 📊 Auditability: 100% logging coverage ensured full traceability and fast issue resolution.
- 🧩 Maintainability: Reduced technical debt and improved onboarding via modular frameworks.
- 🔄 Trigger Consistency: Elimination of recursion and duplication with single-trigger model.
- ♻️ Integration & Reuse: Proteus framework enabled rapid, reusable, and object-agnostic development.



Streamlining Data Operations







Challenge

- Delayed order processing and limited decision-making due to lack of centralized CRM and real-time data.
- Disconnected systems led to data silos, poor integration, and inefficiencies across departments.
- Inadequate customer service and inaccurate reporting.
- Manual Zendesk operations caused further inefficiencies and customer dissatisfaction.

Solution

- Streamlined operations across customer service, sales, and order management.
- Migrated from Zendesk to Salesforce, utilizing features like Email-to-Case, Automated case assignment and Priority rules
- Integrated Salesforce with e-commerce platform for real-time synchronization of orders, data, and inventory.
- Used CRM, analytics, and reporting tools for full visibility into customer behavior and sales performance.

Business Impact

-  Significantly improved customer experience.
-  Instant case creation and automated assignment.
-  Higher customer satisfaction levels.
-  Enhanced brand reputation.



CRM Automation for a Leading Food-Tech Company









Challenge

- Manual lead management from Amplemarket → Salesforce caused delays and errors
- Meetings booked via Calendly not syncing to Salesforce opportunities.
- Time-consuming and inconsistent manual meeting notes entry
- Clients demanded real-time dashboard visibility without logging into Salesforce

Solution

- Automated Lead Capture: Amplemarket leads auto-synced into Salesforce with sales sequence enrollment
- Calendly Sync: Automated pipeline updates when meetings were booked
- Meeting Notes Automation: Avoma integrated for recording + notes auto-sync into Salesforce.
- Client Dashboard via Slack: Salesforce dashboards connected to Slack for real-time visibility

Business Impact

-  Time savings with no manual imports or reporting prep
-  Real-time visibility into pipeline health
-  Higher sales productivity by reducing admin work
-  Improved accuracy with consistent data across systems
-  Scalable solution for onboarding more reps
-  Better collaboration through Slack-based reporting



Real Estate Growth & Customer Satisfaction



Challenge

- Manual CRM processes led to:
 - Delayed customer response and poor communication
 - Lost client opportunities due to slow or missed follow-ups
 - Increased transaction errors and inefficiencies
- Lack of centralized property and customer data hindered decision-making and scalability
- Needed a scalable solution to streamline property listings, improve engagement, and enhance operational productivity

Solution

- Implemented a customized Salesforce CRM to:
 - Automate lead & opportunity tracking with reminder workflows
 - Create custom property-matching objects for agent-client alignment
 - Streamline listing, onboarding, and transaction workflows
- Integrated communication tools and digital transaction systems for seamless customer interaction
- Delivered end-to-end visibility across residential and commercial property pipelines

Business Impact

- 📞 Improved customer engagement and faster response times
- 🏠 Enhanced sales cycle visibility and property matching accuracy
- ✅ Reduced operational delays and manual follow-ups
- 📈 Boosted agent productivity and helped meet commercial and residential property needs effectively
- 🌟 Strengthened brand reputation through innovation and service excellence



Optimizing Feedback Management with Salesforce








Challenge

- Lacked a structured system to handle high volumes of customer feedback
- Issues with data disorganization, delayed responses, and poor website-Salesforce integration
- No survey system; marketing-sales misalignment caused lead drop-offs and missed opportunities
- Needed a centralized CRM to enhance engagement, lead/order tracking, and customer satisfaction

Solution

- Implemented Salesforce CRM as the central hub for feedback and customer data
- Integrated Third Party API and the company's website for real-time feedback capture
- Created custom objects to track ratings, reviews, and feedback
- Used Salesforce case management and automation to streamline ticket workflows
- Leveraged analytics to gain customer insights and improve business decision-making

Business Impact

-  Boosted customer satisfaction through faster, structured feedback handling
-  Improved response times and reduced errors
-  Strengthened brand perception through personalized support
-  Enhanced reporting for data-driven decisions
-  Empowered support teams and supported business expansion



CRM Transformation for a Leading Metal Marketplace



Challenge

- Fragmented data and poor sales pipeline visibility
- Inefficient lead and order management, with limited automation
- Difficulty in generating accurate quotations quickly, leading to delays in order processing and customer communication.
- Lack of forecasting accuracy, customer insights, and strategy alignment
- Needed a centralized solution to streamline operations and drive business growth

Solution

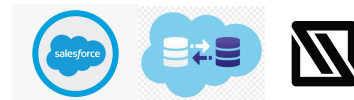
- Implemented Salesforce CRM to unify sales operations and enable process automation
- Features deployed:
 - Lead management and sales pipeline tracking
 - Forecasting tools for sales planning and order accuracy
 - Service Cloud for centralized customer service and faster resolution
- Automated data extraction from records to ensure accurate and consistent quotation documents.

Business Impact

- Improved sales forecasting and reporting accuracy
- Higher customer satisfaction and faster service delivery
- Better team collaboration and order management
- Increased productivity and revenue growth
- Real-time analytics driving informed decisions
- Faster quotation generation improved customer response times.



Automating Case Management & IT Asset Visibility



Challenge

- Manual, inefficient case management workflows with routing delays and inconsistent support
- Lack of a standardized escalation process, impacting customer response time
- Poor visibility into IT assets, leading to inaccurate tracking and reporting
- Fragmented team-to-customer communication
- Difficulty in generating actionable insights from manual reports

Solution

- Deployed a customized Salesforce solution to automate:
 - Case assignment, escalation, and tracking
 - Knowledge base and self-service portal for reduced manual support
- Integrated with ITGlue to sync asset documentation and enable visibility
- Used built-in reporting and dashboards to track service metrics, uncover trends, and enhance accountability

Business Impact

- ⚡ Accelerated case resolution times
- ✅ Reduced manual intervention and errors
- 🧩 Improved asset tracking and visibility
- 📊 Actionable insights into support performance
- 🤝 Enhanced collaboration and transparency across support teams
- 🌟 Increased customer satisfaction and stronger brand reputation



Automating Lead & Appointment Management



Challenge

- Manual data entry caused inaccuracies, security risks, and delayed customer responses
- Appointment booking process was error-prone and unscalable, leading to missed revenue
- Lack of integrated systems limited visibility, personalization, and service efficiency

Solution

- Implemented a Salesforce-integrated solution using:
 - Web-to-Lead forms and APIs to capture customer data in real-time
 - Automated lead validation, mapping, and tracking
 - Trigger-based notifications for follow-ups and appointment alerts
- Ensured data accuracy, improved customer engagement, and reduced manual workload

Business Impact

- Streamlined lead generation and booking
- Reduced manual errors and response time
- Real-time lead capture and alerts
- Enhanced customer experience and personalization
- Scalable solution driving growth and retention



Thank You



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