maventic

Case Study: Seamless Salesforce integration for a leading Power Backup & Solar Solution Manufacturer

Our client is a leader in the power backup and residential solar space with a presence in over 36 countries.

Challenges

Data integration

Connecting Salesforce with other systems posed challenges, requiring meticulous attention to ensure data consistency across platforms and eliminate duplicate data.

Data security

The protection of sensitive customer data was a top priority, necessitating robust security measures to prevent unauthorized access and data breaches.

Data mapping

The implementation process faced potential data and field mismatches, leading to data inconsistency and related issues.

Business Scenario

Seeking to elevate their CRM experience and streamline business processes, our client aimed to implement Service Request Management in Salesforce.

Solution

After evaluating a few Salesforce implementation partners, the client selected Maventic's proposal to implement a comprehensive solution with the following capabilities:

Multi-Channel Complaint Capture
Integrated Salesforce with IVR, WhatsApp, Bot, and customer apps for efficient complaint capture.

Service Request Implementation
Established a standardized process in Salesforce for handling customer complaints.

Workflow Configuration
Configured Salesforce workflows to automatically assign Service Engineers to complaints based on current workloads.

Notification System
Set up email alerts in Salesforce to keep all stakeholders, including customers, Service Engineers, and Dealers, informed throughout the service resolution process.

Data Integration and Security
Mapped legacy CRM data to Salesforce and enhanced security with robust access controls through user roles, permission sets, and authentication measures.

Benefits

Improved resolution time

Enhanced data mapping with Object Manager

Increased data security with authentication roles

Enhanced integration with Salesforce Connect

maventic