

Salesforce - Global IT Service Provider in Enterprise Service Management

CLIENT DETAILS

- Specialized IT Service Provider in Enterprise Service Management with small to enterprise level clients across the globe.

CONTEXT & NEED

- Maintaining the Sales details in excel which was hard to manage
- **Non availability of stable and centralized platform** for managing Sales process.
- Looking for **better ROI** from Salesforce platform

HOW WAS IT DELIVERED

- **Implemented Sales Cloud processes** i.e. Lead, Opportunity, Products, Quote
- **Implemented Custom Objects** for resource management and project management to automate the manual process
- Integrated the custom objects with Sales process.
- **Integrated with Active Directory for user provisioning and SSO**
- **Steady state maintenance** for above implementations – Support & Enhancement

RESULTS

- **One-stop-shop** for Sales process
- **Effective utilization** of Salesforce platform that is aligned with customer's business objectives
- **60% increase in Lead to Opportunity conversion**
- **75% Automation of manual work related to Sales process**
- **Accurate and concise view of resource utilization and availability**
- **Better control on billability leakage**

ENVIRONMENT DETAILS

- 3 Region - NA, EMEA, APAC
- Salesforce Release: Summer '24
- Salesforce Modules: Sales Cloud, Platform
- Integrations: Active Directory