

Leading Global Manufacturer Migrates To Salesforce Cloud CRM To Support Enhanced Customer Experience

Industry

Industrial Manufacturing

Products & Services

Salesforce CRM

Implementation Partner



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The customer is one of the world's largest manufacturers and distributor of garment hangers. To cater to the changing business and customer requirement, the organization chose to migrate to Salesforce as a centralized CRM system to support enhanced customer experience.

Challenges

- Manual data entry, data redundancy and inconsistency due to multiple data sources
- Lack of adequate data security, resulting in data misuse and data pilferage
- Lack of web portal or knowledge base for customers to access/enquire about products or orders online
- Tedious budget approval process
- Inadequate audit details, missing on audit preparation which might lead to license cancellation

Solution

CRM IT offered a customized Salesforce CRM solution that brought in the desired business benefits. As a first step, CRM IT carried out a detailed analysis of their existing CRM system.

The initial requirement was to migrate all the legacy data which were either Service Request records or the activities from the former Oracle CRM On Demand to the new instance.

Also, there was a definite need for carrying out data validation. Since the client was moving to a completely new Salesforce system, their requirement was to enable the lightning user experience as well. Many Visual force pages were customized and a community portal was setup to effectively gather information in one place. The customer service requests were automated in the new

system and a customized audit tracking module was integrated along with it to make sure that all the required information is tracked and available on demand

Benefits

- Data validation ensured accurate and consistent data regardless of the data source. Lightning user experience on desktop and mobile.
- Custom visual force pages restricted copying, pasting, selection & printing to maintain the confidentiality of the information
- Communities' portal for customers, for unprecedented control over purchase decisions, service request resolution & other value added information.
- Customized audit tracking module ensured all the required information is tracked and available on demand