

## CASE STUDY



### INDUSTRY

## Ed-Tech

The pioneer firm to revolutionize professional education in the country, enhances and re-designs their process standardization approach using Salesforce.

### Value Creation Modules

#### Process Consulting and GAP Analysis

End to end audit and consulting of the different business process automated on Salesforce

#### Technical Audit of The Current Salesforce Setup

End to End study and audit of the current system at the configuration, data and code level to define the optimization areas

#### Functional & Technical Documentation

The audit report had findings as well as recommendation and plan to optimize and enhance the usage.

#### Best Practise Recommendation

The audit report had recommendations related to best practice in terms of coding, OOTB features and integrations

#### Managed Services

Dedicated team to execute enhancements, backlogs, functional consulting and steady state support.

### Personas



- Sales Team
- Operations Team
- Leadership Team

### Products & Technologies Used



Platform



sales cloud



Analytics

## INDUSTRY

# Ed-Tech



## CHALLENGES

- Inaccurate data and low data quality
- Reporting structure not streamlined
- Lack of process standardization in different verticals of sales and service.
- There was no unified integration strategy being followed.
- Lots of Salesforce OOTB features were not being utilized.
- Lack of defined DevOps process and code quality standards.
- Data mismatch in reports due to duplicity of data.
- Lack of proper functional and technical documentation.

- Structured interviews were conducted with the different business stakeholders to identify the as – is and to-be state.
- End to end technical audit of configuration and customization were conducted to identify the optimization areas.
- Sanity of data was conducted and elimination of duplicates
- Automation and manual fix of legacy data

- Redesign of reporting structure following DAR approach
- A structured FRD and TSD was prepared and submitted for future reference.
- The OOTB features like Einstein search were enabled
- Trainings to the end user and management team.



## SOLUTION



## BENEFITS

- Reduced timelines for resolving tickets, better analysis and improved planning sessions via Salesforce reports.
- Better utilization of the system
- Correct reporting avoiding duplicate data.
- Structure functional and technical documents to reduce vendor dependency.
- Re-alignment of the downstream orgs.
- Better adoption of the system by the business user by virtue of onsite trainings, content and handholding
- Better understanding of code quality implemented.