

Maximizing Sales Productivity through SFDC Integration



Background

The client is a well-known IT services and consulting firm that was struggling with the non-scalable point of sales solutions for its customers and sales team. To adapt to the changing business needs, there was a requirement to devise a strategy, design and deploy a scalable solution that was not only flexible but also user friendly. To meet this requirement, Trianz was engaged to develop an end-to-end solution by integrating with SFDC to increase sales productivity.



Challenges

The main challenges in executing this project for the client were the following:

- ▶ Limited visibility into customer related information as there was no single point of access to transactional data such as orders, contracts, install base, support tickets
- ▶ Multiple system of records which were not integrated to sales force systems
- ▶ Maintaining rules and logic for data updates between multiple and disparate systems
- ▶ Limited project budget to build the system and transform the existing processes



Business Execution Approach

Trianz conducted a detailed study of the client's existing processes and pain points to understand the degree of change required. Gap Analysis was performed to understand the transition of the "To-Be" state from the "As -Is". Interviews were conducted to identify the areas that commonly caused problems and were seen as a bottleneck within the organization. The development team findings revealed that Open Standards based SOA Suite infrastructure and Pre-built processes using Web services should be implemented.

Trianz development team rapidly deployed integrations into existing infrastructure and application landscape. Integration testing and acceptance testing were conducted. Original requirements were validated before rolling out the solution.



Technology

Open Standards based SOA Suite infrastructure, Pre-built BPEL and ESB processes using Web Services, SFDC, Enterprise Firewall and Oracle 11i ERP



Successful Business Results

Trianz achieved the following business results for the client:

- ▶ Increased sales productivity and insights by providing real time access to transactional data such as orders, contracts, install base and support tickets
- ▶ Reduced sales cycle time by automating opportunity to quote creation process and the associated approval workflow within the sales organization
- ▶ Improved information sharing and increased data accuracy through single version of truth of sales related master data i.e., customers, products, salespersons
- ▶ Ability to extend the pre-built processes to meet customer requirements

About Trianz

Trianz is a dynamic and fast growing firm that helps leaders in client organizations formulate and execute operational strategies to achieve business results from a senior management perspective. With a focus on Business Digitization, Analytics, Cloud Enterprise, Mobility and Cloud Infrastructure, we bring the best of consulting and technology experiences, execution models, and IP to deliver consistent success to clients. With offices in Silicon Valley, Washington DC Metro, New York, Bangalore, Chennai, Hyderabad, and the UAE, Trianz serves a wide range of clients from *Fortune* 1000 to emerging companies in high tech, insurance, financial services, retail, life sciences, public sector and logistics industries.