



SALESFORCE
SALES CLOUD

CASE STUDY

CUSTOMIZATION OF SALESFORCE SALES CLOUD

Helped a global omni-channel customer experience and contact center solution leader deploy sales cloud to **increase accuracy & gain meaningful business insights**

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Problem Statement

The client, a global leader in omni-channel customer experiencer and contact center solution, was looking for complete customization of Salesforce Sales Cloud.

Business Need

The client needed a cloud-based solution for:

- Entitlement/service
- Contract transfer
- Automation of various processes
- Custom approval processes
- Automation of various communications
- Effective deal support

Solution Approach

- Provided custom solution for approval process
- Introduced login flows to acknowledge company policies and forced log-out
- Customized lead conversion process
- Provided custom solution for entitlement/service contract transfer
- Employed automatic user deactivation system with predefined criteria & monitoring system
- Provided custom solution for deal support
- Developed WAVE Analytics to create key strategic reports and dashboards

Benefits

- Enabled business leaders to perform various operations, along with the approval process
- Built user deactivation automation for increased accuracy and decreased manual interventions
- Created the entitlement transfer process to provide clients a platform to see the full transfer hierarchy and history
- Developed WAVE analytics to help clients to better analyze the strategic data to gain critical business insights

Technology Stack

