



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



Analytics



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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.