

## CWWR Salesforce Project Experience

An advanced and experienced team of management consultants specializing in all aspects of sales and marketing enhancements with a lot of experience building out solutions that include Salesforce platforms. Starting from business assessment, analysis, process review, requirements definition through implementation, customization, change management, training and post live support.

### Solutions Offered:

- . Sales & Marketing Effectiveness
- . Revenue Alignment
- . Lead Generation
- . Go To Market
- . CRM & Salesforce



### Product Experience:

- . Sales Cloud
- . Marketing Cloud
- . Services Cloud
- . Force.com Custom
- . Community/Portals
- . Informatica (Salesforce Cloud Integration Specialty!)
- . SteelBrick
- . Conga
- . ServiceMax
- . Riva
- . Marketo
- . Hubspot
- . Eloqua
- . Seibel Conversion

### Certifications:

- . Admin
- . Advanced Admin
- . Developer (multiple levels including Advanced)
- . Sales Cloud
- . Service Cloud
- . Marketing Cloud
- . Force
- . Informatica
- . Project Management
- . Change Management

### Industries:

- . Banking
- . Insurance
- . Telco
- . Utilities
- . Energy
- . High Tech
- . Professional Services
- . Manufacturing
- . Public Sector
- . Life Sciences
- . Retail & eCommerce

# Salesforce Client Project Outcomes

## Project Overviews and Outcomes

### 1. Global Target Account Sales & Marketing Alignment

A major Energy services organization increased target account management transparency and productivity. Leading to being selected as the only vendor in its product category to become a 'Vendor of Record' supplier by a mega Global Energy conglomerate through its Global Strategic Procurement team.

#### Target Accounts:

Implement a prioritization process to identify the top 25 accounts globally and the top 25 by 5 divisional geographies (Canada, USA North, USA South, Australasia, and Europe). Training included communications and enterprise selling into large global organizations.

#### Client / Contact / Opportunity Management:

Installed within 120 days globally across 250 sales, field operations, and marketing teams the use of Salesforce for all client communications, opportunity tracking and forecasting, and central contact files.

#### Marketing Automation:

Using Salesforce installed marketing email campaigns and event management to coordinate all outbound communications and track interest through attendance of all customer events.

#### Industry Intelligence:

Build in custom links to external sources to create an all in one service tool for business development. This included the use of business analysis to build tailored dashboards for specific market, industry, competitor and client information and trends.

### 2. Professional Services Case Management across North America

Global professional services corporation: built client contact management and project case process workflow across hundreds of professional practitioners.

#### Client / Contact / Opportunity Management:

Using Salesforce, implemented and automated all client related entry / tracking / management for business development, professional services and administration.

#### Case / Project Management with Market Intelligence:

With Force.com as the platform tailored a process workflow to track projects, opportunities, contracts, project groups, as well as a customized information database to consolidate upwards of 100 sources of industry and market information.

### 3. Wealth Management

A SFA implementation throughout North America for the executive team, account managers and administration support was installed in 90 days. In addition a custom application on Force was added in Phase two to track deposits, withdrawals and account holdings. Conga Composer was used for forms management to handle invoicing and order confirmations.

### 4. Global Cloud Based Customer Intelligence

Integrated solution for sales automation, advanced configuration of intelligence components completed with a large scale reporting and tailored dashboard automation offered via a Community Portal.

## 5. Organization wide Process Automation

Starting from requirements gathering across multiple departments this North American Financial Institution benefited from process automation and a central system for tracking, managing and reporting on all client related activity. The Salesforce implementation established efficiency and increased productivity across all departments. Management was able to get timely and granular reports on all client activities.

### Customer Management

Implement & automate all client related entry/tracking/management.

### Monthly Billing

Configured tier (volume) based Customer price-books and implemented logic to use the price-books and auto generate opportunities used for billing.

### Request/Ticket Management

Customize case object and workflows to implement and automate request /ticket management between client services and the technology teams. Develop VF pages and components which allow emails with VF components to be sent to users / queues as part of the ticket life cycle.

### Project Management

Develop custom objects and workflows to maintain the entire life cycle of a project. Allow users to update and assign projects and generate reports.

### Campaign Management

Customize campaigns for Marketing & sales.

### Prospect Management

Customize Leads to allow tracking/management of prospects.

## 6. National Reservation System

Including requirements gathering, change management, training and complete roll out this online mobile phone reservation interface was deployed over two phases in 8 months. It set up this National Mobile provider to take in over 10,000 reservations per day via Salesforce platform integrated via web services into backend systems.

### Device Reservation Website

Develop the front end interface (website) using VF page that allows wireless customers to reserve a new device and select pickup location.

### Fee/Credit Automation

Integration with internal Billing system. Consume WSDL and allow web service callouts to be made for fee & credit application in real time.

### Fulfillment/Shipping Automation

Integration with AS400 and Oracle system. Expose custom web service in Salesforce. Consume Oracle WSDL. Allow for web service call outs to start the fulfillment process. Allow for inbound web service calls to update Salesforce when shipping has been completed.

### Order Queue and Notification

Update customer order reservation. Queue is updated on a nightly basis using Batchable interface class. Customers are notified of their order reservation in the queue for each phone model. Customers can also view their place in the queue in real-time.

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## 7. Customer Service Portal

Coordinate requirements, deliverables and timelines with stakeholders including client. Coordinate with offshore development team and client for UAT. Configure and customize the Salesforce customer portal. Allow internal and external users to login and view status/updates to their orders.

## 8. Insurance/Underwriting Case Management

- Coordinate project deliverables and timelines with stakeholders; Requirement gathering, workshops /sessions with business units across the organization.
- Provided a Senior BA role on Force projects requiring custom development.
- Conduct interviews and meetings with key stakeholders to extract the pain points and key requirements.
- Complete overhaul of existing process for insurance underwriting. Used Salesforce as the main system to track and maintain each underwriting case.
- Allow assignment of each case to difference teams and agents. Salesforce replaced an existing legacy system and provided integration with existing SORs.

## 9. Investment Advisor Client Management

Improved navigation and more efficient client management for Investment Advisors and their teams.

### Redesign of Client/Contact page layouts

Develop new page layouts based on a tabbed layout using VF.

### Restructure of Households

Develop new custom objects (junction object) to allow for many-many relationship. Develop a new household page layout which allows rollup of all members' activities & notes. Data migration of existing households to the new structure/schema.

### Custom Mass Email & Mail Merge

Develop a completely new process to allow users to Mass Email and Mail Merge. Users are able to generate an ad-hoc (free-form) email or a template based email which opens in outlook and can be sent from outlook. The email also automatically creates an activity record in Salesforce and provides the user the option to save the actual email in its original format back in Salesforce. The new Mail Merge process allows users to build and import letter templates into Salesforce. These can be used to merge letters for single or multiple records and the document will automatically save back into Salesforce.

### UDF Migration

Data migration from custom objects to the Account and Contact objects. Use logic based excel sheets and a custom program to upload data from custom objects to standard/custom fields on the Account and Contact object. Approximately one million records were migrated.

## 10. Canadian Anti Spam Legislation (CASL)

Enhance the custom Mass Email feature to allow CASL parameters. This had to be implemented as part of the CASL regulatory requirement. All emails initiated from Salesforce using the new Mass Email feature are now 'scrubbed' to make sure consent has been provided.

## 11. CASL Common Application

Develop a force canvas app that will integrate with an internal bank application related to CASL. Users can launch this application from client records and via a JSON payload the CASL application will load all the data.

## 12. Encryption

Implement third party Encryption for 2 separate lines of business. All existing standard and custom functionality / features need to accommodate encryption. All integration need to be considered during this project.

## 13. Global Asset Management (GAM)

Implement GAM process model for multiple business units across the globe. Allow for cross selling and sharing of client data. Integrate with multiple end points for data.

## 14. Global Sales + Service + Community + Custom Apps

Across a world-wide organization, using built a tailored implementation of Salesforce and Force to manage sales force automation (SFA), customer service and help desk (Service Cloud) integrated to a client and partner facing Community/Portal. Two addition custom applications built on Force added the capabilities of product search and inventory availability. The corporate web site was integrated into the overall workflow via API integration.

## 15. Wealth Management

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## 16. Utility Project Management in the Cloud

Starting with consultation on Agile based application builds and best practices for rapid requirements understanding, this Utility implemented a Cloud based platform for project management. Integrated with a Salesforce Customer Community Project Status and Client communications used Conga Composer for project reporting and updates. Salesforce Marketing Cloud was also integrated to manage customer event registration and attendance via numerous Corporate web sites.

## 17. Global Manufacturer Sales + Service + Large Scale Custom Build Application

An international manufacturer of large scale equipment and supplies tailored an implementation over several phases to align sales and service plus supporting administration. Operating in a fairly niche industry, a large custom application was integrated to support the key tasks and events throughout the sales and installation of equipment including ongoing supply and service post sale and through operations life cycle.

## 18. Life Sciences Global Sales + Service + Community + Custom Integration

This large global life sciences conglomerate implemented a complete sales and service platform including an integrated Salesforce partner community. Service Cloud was also complemented with ServiceMax for Field Service Management. Completing a full order and service life cycle SteelBrick was also integrated for Configure, Price and Quote functionality for the field teams.

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## 19. Cloud Sales and Service for North American Software Firm

Project kicked off with management consulting to create organizational alignment between marketing sales to support enhanced growth and a deeper organization focus on profitable projects.

A completely re-engineered sales and marketing process was automated via Salesforce including extensive data integration to both internal systems and external marketing intelligence sources. In the overall process integrations including Conga reporting; tailored Dashboards for each role group; and GoToWebinar + Marketo for marketing event management and lead generation support to sales. Riva asset management was also integrated to support a large group of targeted high margin accounts.

## 20. North American Manufacturing Sales + Service + Shipping

Implemented across Canada, USA and Mexico, this installation integrated Sales and Service Cloud supporting field operations and supporting administration. A custom application on Force was also implemented to facilitate a customized quoting and ship-to process.

## 21. North American Financial Services Sales + Service + Large Scale Customization

A full sales and service implementation including workflow administration implemented after a detailed management consulting process analysis. A tailored workflow and process-based customization application was integrated on Force to support the specific niche industry of financial services.

## 22. And many more.....over 100 total projects worked by this team.

### In partnership with CWWR

If you would like to work with us on your next revenue project, please contact Alex MacKay to discuss how CWWR can help you plan, business case and implement a successful solution.