

Increase Opportunity Visibility through a Sales Force Automation Application

Salesforce.com

Client Overview:

- One of the leading Hi-tech Services player offering technology solutions to customers globally, wanted to create and build a sales force automation application. The objective was to assist its sales teams to effectively manage leads to quote process, sell more, up sell and cross sell.
- Salesforce.com was chosen as a platform of choice to simplify and optimize their marketing and sales business processes.

Business Problem:

- Some of the challenges that the client wanted to address were:
 - One-stop-shop to manage and execute focused campaigns globally and across the service offerings
 - Effectively manage leads from campaigns as well as external lists and implement a robust conversion process
 - Manage opportunity life cycle
 - Competition analysis
 - Manage revenue recognition
 - Integrate to other enterprise systems to trigger downstream provisioning
 - Sales & Marketing analytics
 - Spatial reporting to enable easy access to sales teams
 - After due assessment, Happiest Minds proposed salesforce.com as the enterprise CRM tool to optimize business process modules.
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- Happiest Minds proposed a holistic solution which was agile, scalable, and cost effective which met the client's requirements based on salesforce.com Sales Cloud
 - Happiest Minds proprietary accelerators and deep competency in this area ensured client delight specifically in the areas of data migration and integration

Happiest Minds Proposition/Solution:

- Happiest Minds proposed a holistic solution which was agile, scalable, and cost effective which met the client's requirements based on salesforce.com Sales Cloud. The engagement involved providing Discovery, Advisory, Development, Implementation and Maintenance services. Integrated solution included Business Process Consulting and Web services.
- Technical highlights of the engagement are:
 - CRM integration to enterprise systems
 - CRM integration to Marketing Campaign Execution System
 - Spatial reporting of key salesforce.com data
 - Customized revenue recognition module
- Happiest Minds proprietary accelerators and deep competency in this area ensured client delight specifically in the areas of data migration and integration.

Benefits:

- Increase in opportunity visibility, over 40% increase in opportunities entered into the system quarter over quarter
- 100% opportunities tracking in CRM moving away from excel spread sheets
- Application up and running in less than seven weeks
- User adoption for SFDC >65% consistently, post go live
- Increased visibility into customers, contacts and various activities pertaining to each of them