

# Salesforce.com Cloud Implementation

## Executive Summary

The client firm Australian Risk Services is a multidisciplinary firm contracting work to another firm was a challenge for them. FiDigital's immense experience in Salesforce cloud implementation helped establish the initial trust level. This was well supported by the different business engagement models FiDigital proposed to the client firm. Our developers worked on each of the requirement provided by the client team and provided a best feasible solution what later became a long and healthy relationship amounting on fully satisfied Salesforce sales cloud solution, crucial to the success of the client firm.



## About our Client

**Client** Australian Risk Services | **Location** Victoria, Australia | **Industry** Commercial Risk Management

## Business Situation

Being a multidisciplinary firm client was in search of a complete integrated solution for managing all interactions with their customers and prospects so they need a fully customizable product that brings all the customer information together in an integrated platform that incorporates marketing, lead generation, sales, customer service, business analytics and much more so The firm hired FiDigital to configure and customize the Salesforce Sales Cloud CRM.

## Solution Details

### The FiDigital Solution

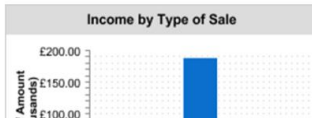
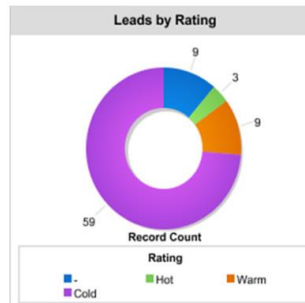
- ✓ Provided an end to end overall solutions architecture that captures systems, departments, roles, customers & operational processes that interact or are impacted to meet their requirement.
- ✓ Defined the processes for Account Management, Contacts Management, Opportunity, Service Offerings, Quote, Order Management and Case Management.
- ✓ Configured Salesforce organizational (global settings, accessibility, role, permissions) and configured views, workflows, reports and dashboards.
- ✓ Migrated prospect and customer data into Salesforce from legacy system.
- ✓ Setup Account hierarchy and structure.
- ✓ Increased number of closed won opportunities, more referral by clients for lead as shown in image.



## Dashboards

Stage	Sum of Amount
Prospecting	£ K
Proposal/Price Quote	£ K
Closed Won	£ K
Closed Lost	£ K
Not Qualified	£
placed	£ K

Date	Record Count
30/04/2015	2
04/05/2015	1
05/05/2015	1
14/05/2015	1
15/05/2015	1
18/05/2015	2
19/05/2015	8
20/05/2015	2
22/05/2015	1



### Technology Used

Salesforce CRM platform, Apex, Visualforce, Triggers, Workflow rule, validation rule, Data loader.

### Methodologies

Due to the remote development nature of the project, we and the client came to conclusion that we will be following spiral/iterative model of software engineering for the development. By following these principles we will be releasing the builds for our internal testing and at the same time regular uploads to client team for reviewing the current development work as well as suggests/requests new changes before the final release. By using this methodology client can review the working of the product in actual environment much before the final release and can make a change request/new feature during the development phase itself without compromising on the final delivery date.

Apart from regular core software engineering principles, we also follow:

- ✓ Development document
- ✓ Coding discipline document
- ✓ Code reviews
- ✓ Configuration management

To support this methodology FiDigital configured the following process into Salesforce platform sandboxes.

- ✓ Development
- ✓ Testing
- ✓ Staging
- ✓ Production



## ***Results/Outcomes***

After just a week of implementation below are the outcomes:

- ✓ ARS was able to run targeted marketing campaigns and track performance
- ✓ Improved marketing outreach at 40%
- ✓ Salesforce .com is used as the only system to manage sales and track client projects.
- ✓ Faster and reliable process.
- ✓ Increased user adoption from simplification of the user interface.
- ✓ Increased user satisfaction from improved security and implementation of best practices.

**Want to see these kinds of results for yourself? Give us a call today at +61(452) 215-292.**  
We're here to make Salesforce work for you.