



A customized Sales Cloud implementation, including ERP functionality, Lead Management & Telephony integration.

THE CHALLENGE:

5S Components did not have an adequate Customer Relationship Manager (CRM) platform to help their customer service team manage customer interactions. They were unable to gain insights into their own customer's issues. Additionally, customer service representatives had no way to easily share information between departments regarding service disruptions. These challenges made it difficult to provide acceptable customer service for the organization. Along with improving customer service processes, they wanted a way to revitalize their current Content Management System (CMS) so it could better serve their organization. Specifically, they wanted a CMS that would integrate with their chosen CRM and lead generation software.

THE SOLUTION:

In order to help achieve their business goals, App Solve implemented Salesforce.com's Sales Cloud for the entire organization. App Solve implemented Chatter, dashboards, and customized reports to improve the way the customer service team handled customer issues. At the time, they were utilizing OnBase as their document management system (DMS) to help manage communications related to customer services. App Solve replaced this system with Salesforce.com Email-to-Case and migrated all of the existing content into Salesforce so that all of their information was consolidated into one central system – including all product, quote and order lists. App Solve updated their CPQ process by building an entirely new CPQ system in Salesforce that is synchronized to their quote processing in SAP with automated notifications, auto-generated pdf documents, and reporting.

THE RESULTS:

By implementing Salesforce and updating the CMS platform and CPQ process, App Solve helped 5S Components increase efficiencies within their organization. Using Salesforce, the customer service team has improved collaboration and information sharing, allowing them to better serve customers and resolve cases faster. Replacing the OnBase platform with a single integrated system reduced the amount of time employees spent navigating multiple systems and the number of data entry errors. Now customer service representatives are more efficient and the sales team is better able to sell using a streamlined quoting process that leaves the team more time to serve other customers.