



Salesforce Health Calculator for an underutilized Salesforce Org

About the Client

The client is one of the exclusive wineries based out of California. Salesforce Classic was being used for customer service cases only. Having an external Ecommerce platform and marketing campaign tool was causing data scattering and lack of proper insight into sales.

Business Needs

No documentation for Salesforce customizations. Salesforce potential not fully realized - integration with external systems incomplete. All users not onboard with Salesforce implementation. Reports and dashboards not used effectively.

Solution

- ✓ Quick lightning migration analysis.
- ✓ Training to create effective dashboard and reports.
- ✓ Setting up Outlook integration tasks, activities, views and lists with existing licenses – no additional investment.
- ✓ Identify quick wins like referral and feedback management.



Benefits

- Non-user Hospitality user team adopted Salesforce.
- Better customer journey experienced.
- Users report implementation is now easy to use than previous system.
- Technology used Custom built assessment calculators.