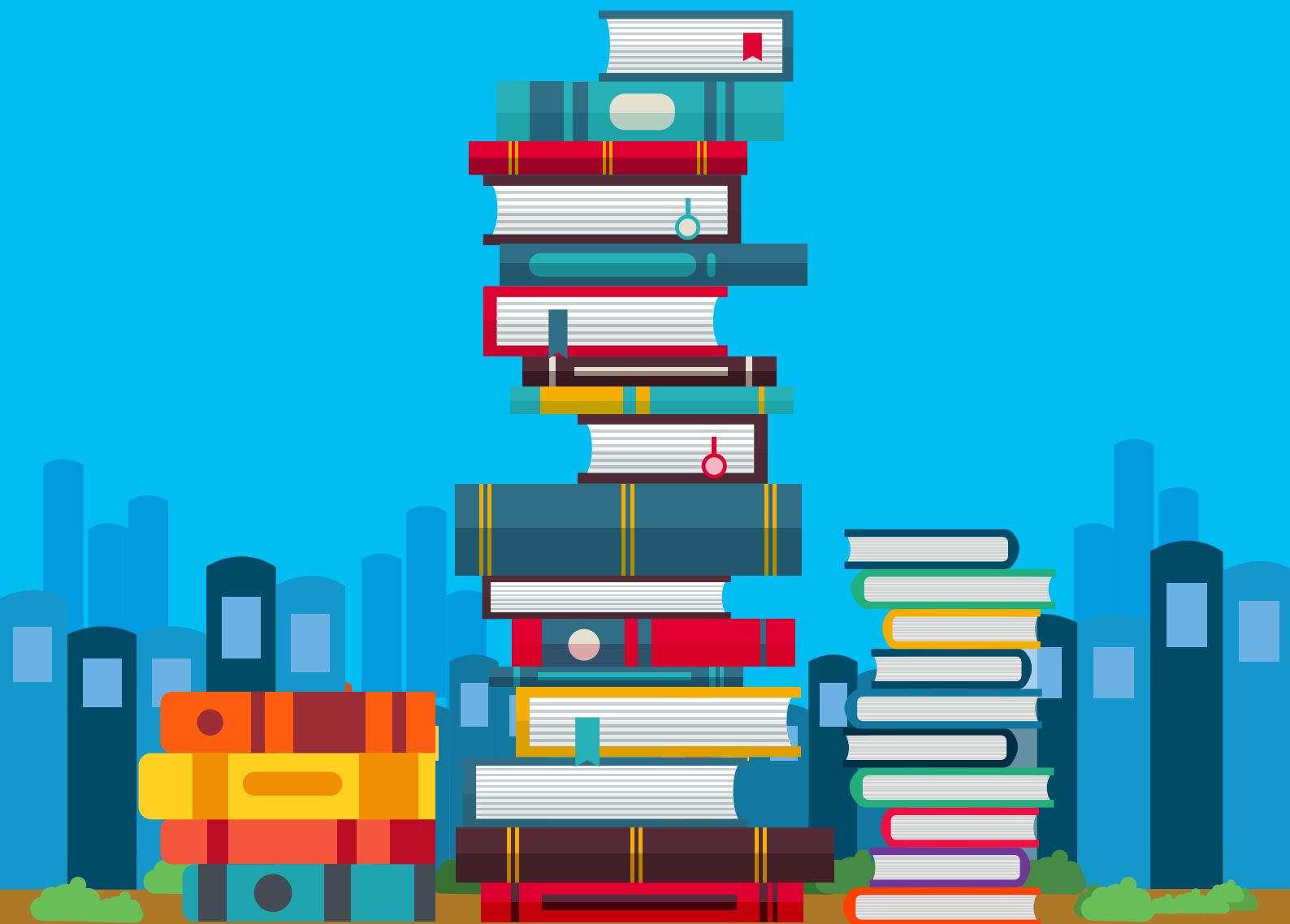


salesforce



CREATING A *SINGLE SALESFORCE INSTANCE* FOR A *SELF-PUBLISHING GIANT*

A Dedicated Global Team to effectively manage multiple Salesforce
orgs for a US based pioneer in the self-publishing domain

JUNE | 2016

THE CLIENT

A US-based self-publishing giant providing technology enabled publishing services to aspiring authors. A client with a huge global presence having around 36 country-specific websites that offer different self-publishing services to its customers. The organization makes publishing accessible and affordable to anyone, anywhere and anytime.

THE BACKGROUND

The client provides customized self-publishing packages to its users, and runs a 24*7 customer support through an internal order portal to onboard new as well as existing customers into self-publishing projects. Salesforce CRM is the business logic container for the client and all customer data gets into Salesforce from various web services. They required a strategic technology partner who can help them in establishing a unified business model to leverage the full potential of Salesforce to procure a strong berth in the self-publishing business.

THE CHALLENGES

Managing multiple geographies:

The self-publishing company was in the process of acquiring companies belonging to multiple geographies and cultures. This prevented them from creating a unified business model for all its clients. Multiple acquisitions hindered the implementation of a unified business model.

Managing several legacy systems:

Collaboration of data from multiple legacy systems created issues like duplication and loss of data. This in turn affected the performance of the existing system.

Cost factors:

Multiple resources were required and hired to manage the websites of the self-publisher's clients using different technologies. Previously each website used CRMs and technologies from different vendors and there was no streamlined process to manage all the sites for the client. Separate admins were appointed for handling each CRM and this incurred heavy cost on infrastructure. Besides this, it took a toll on the finance with the need to pay for the licenses of multiple orgs. Having a single org will bring the license cost down.

Inability to leverage AppExchange:

The client could not exploit the possibilities of technologies to leverage the complete AppExchange potential. This called for the necessity to have a unified business model that can make effective use of the AppExchange.

Other challenges:

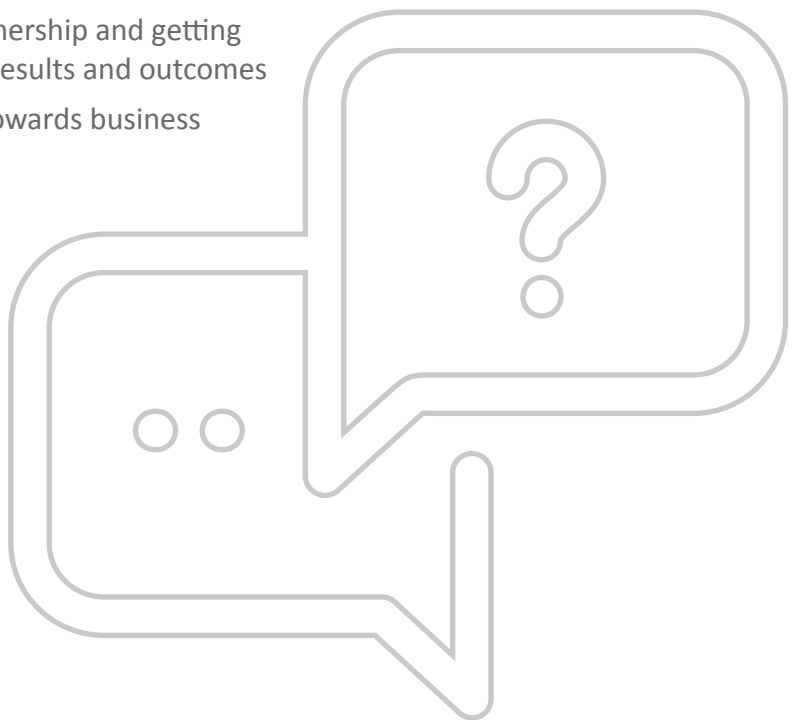
- Scalability issues
- Maintenance of data
- Improving User Experience

THE SOLUTION

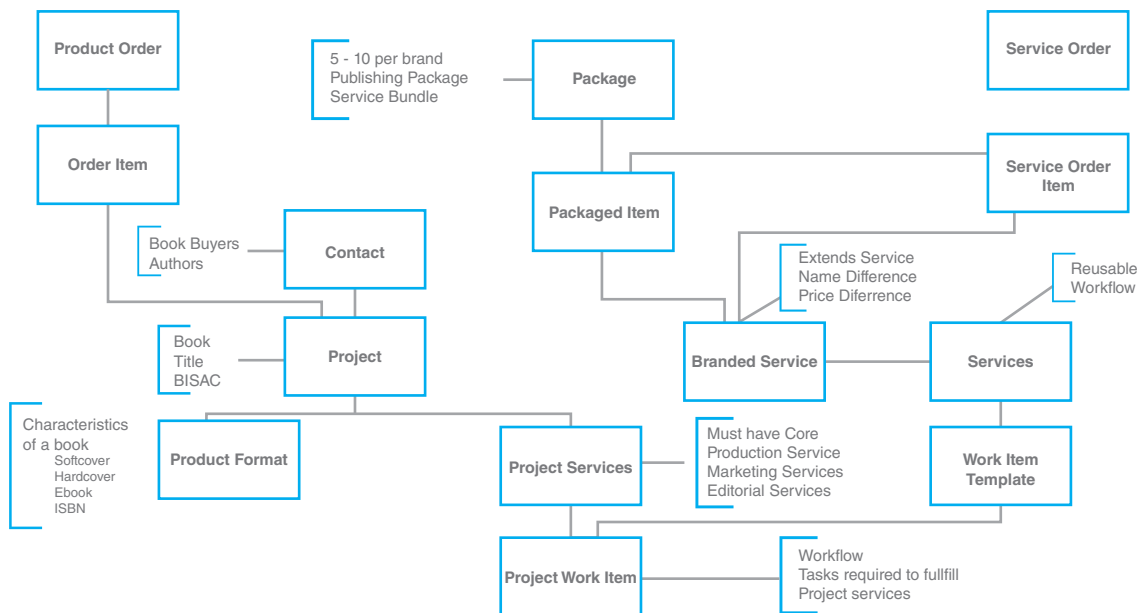
- To develop a single instance for managing multiple Salesforce orgs- one place to store data and share information.
- To establish a unified business model for all websites by identifying the commonalities of the clients.

WHY SUYATI

- Salesforce partner and AppExchange Program Partner
- Suyati's pioneering model called Dedicated Global Team (DGT), wherein clients can build their own team within Suyati (in-house solutions) and hold the reins of the team in their hands.
- Rich skills in Force.com platform and AppExchange consulting
- Vast expertise and specialized knowledge in Salesforce CRM
- Ability to identify and provide the right resources
- Laying more emphasis on ownership and getting motivated with the business results and outcomes
- More focus and orientation towards business through technology

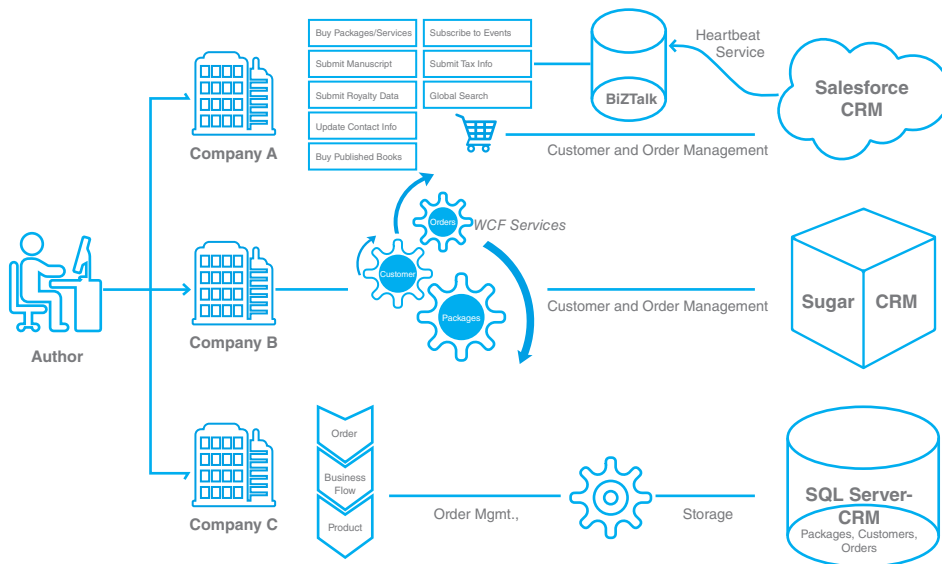


REDESIGNED WORKFLOW



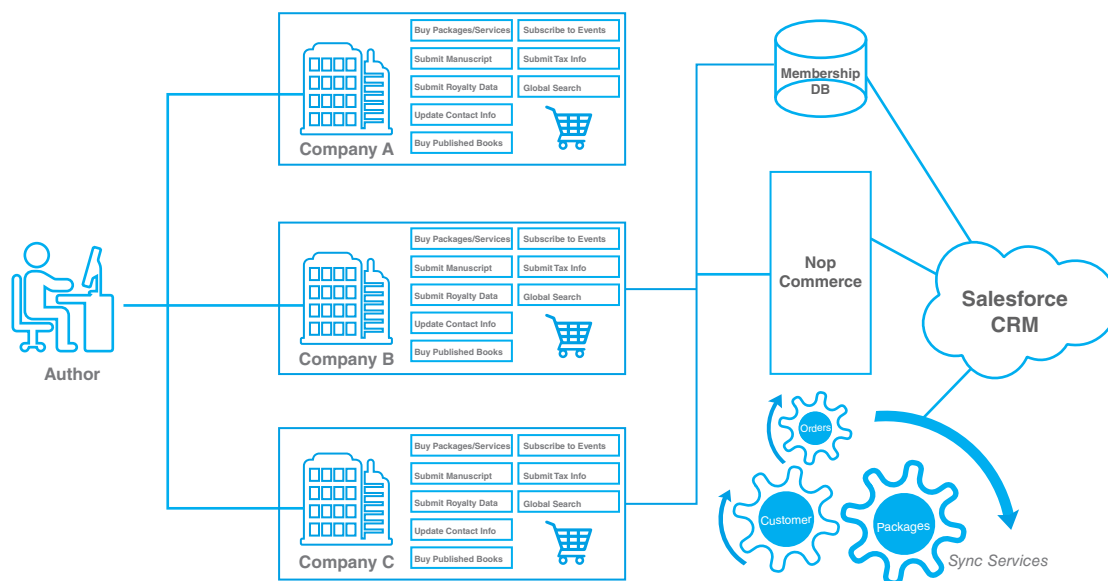
Shows how product order, package and service order get processed in the CRM.

PREVIOUS ARCHITECTURE



The above architecture diagram shows the initial architecture, in which the CRMs/ back-end of all the three clients of the self-publishing giant are different (Salesforce CRM, Sugar CRM and SQL Server-CRM). In addition to this, the customer order management is also different for each of them. With data flowing into different CRMs, coming up with a unified business model was quite challenging.

REVAMPED ARCHITECTURE



In the revamped architecture, we can see that each website is integrated with respective shopping cart that allows users to select the required package of services that they need from the self-publishing service provider. The self-publishing client is now able to take daily back-up of their customer data in-house, so that even if they need to move to a different CRM in future there will be no data loss.

The new architecture design introduces a unified CRM for all the three clients (of the self-publishing firm) shown in the above diagram. Even if the clients are using different technologies and do not want to scrap their existing site, the service layer syncs the existing technology with the back-end, without affecting the workflow.

KEY HIGHLIGHTS OF THE PROJECT

Salesforce instance redesigned. Following are the highlights:

- Single Instance of Salesforce
- Designed common business flow
- All departments connected using project work items (PWIs)
- Schedule Dispatcher & Apex Logger framework
- App Exchange Apps used –DocuSign, DupeBlocker, Distribution Engine

Other Major highlights:

- **DocuSign For Salesforce** –enabling electronic signature & agreement compliance
- **Lead & Contact Distribution** –round robin distribution of leads and contacts for different teams operating in different parts of the world

- **Object Security** –Profile & Permissions refinements
- **Security Scan Improvements** –for better code utilization and coverage
- **Apex Logger Framework** –for extreme error logging from any parts of Salesforce code
- **Observer Pattern** – for on-demand asynchronous code execution
- **Apex Trigger Optimizations** –as business grows, we need to upgrade the code for more streamlined and efficient code execution in Salesforce platform
- **Version 2.0** –SOA enhancements in Salesforce which will open up web services from Salesforce for third party apps and services to hook into re-using Self-Publishing business logic.

ENGAGEMENT MODEL

We offered a unique DGT engagement model to the client that helped them in overcoming the challenges, which they were facing with vendors in the past. Pioneered by Suyati, Dedicated Global Team (DGT) is an engagement model that gives clients the opportunity to build and own an in-house team within Suyati. The core strength of the DGT model lies in the complete creative, technical and financial control it offers the client over the team and the way the projects are carried out. The model brings together the advantages of IT outsourcing, while wiping out its drawbacks.

At Suyati, we proposed 2 dedicated teams, which had the right skill sets and experience the client needed to accomplish their business goals. The DGT focused on reduction of operating costs, faster release time to market, leveraging critical internal IT staff for strategic work, greater flexibility, and most importantly, dedicating more time and energy to concentrate on core business rather than technological support.

Advantages of DGT:

- Better visibility and positive feedback
- Immense infrastructure
- Build and retain client specific talents
- Total control over input and output
- Highly secure IP
- Transparency in costs- both people & operational

PROGRESS & TIME COMPOSITION

Project duration	1 year
Discovery phase	2 months
Implementation	8 months
Quality Assurance	1 month
Resources	2 dedicated teams

ABOUT SUYATI

Suyati provides marketing technology and integration services for companies that wish to combine the best of breed solutions and create a unified approach to customer acquisition. This unified digital marketing approach requires system integration between various CMS and CRM platforms, and a slew of e-commerce, Marketing Automation, Social Media Listening, email and social marketing, and customer service systems. Our specialized knowledge in Salesforce, open source and .Net based systems enables us to build effective custom integrated solutions for our clients.

Suyati's custom technology solutions have been deployed in companies in the US, Western Europe and Australia, and have helped many enterprises leverage the web/cloud/mobile technologies to acquire customers through integrated digital marketing. Suyati is based in Chicago with product engineering capability out of the US and India.

To learn more visit:

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