

## Providing homogeneous platform to a Financial Consultancy

### Challenge

- Salesforce used only by sales team to manage Accounts and Contacts.
- All other departments used excel sheets, resulting in absence of common data source.
- Need to enhance Salesforce functionality by implementing business automation and company website using Salesforce.

### Our Solution

- Implemented Salesforce to provide a single homogeneous platform to store and process all customer data consistently.
- Implemented HR Management to help HR team generate employment contracts and payrolls from Salesforce.
- Implemented Project Management functionality by using standard objects like Account, Contact (Employees), Opportunity (Business) and multiple custom objects to manage the entire client's project life cycle.
- Installed AppExchange products like Conga, Ecosign, Timba Survey to help sales, operations and HR teams to generate employment contracts, client contracts and contractor contracts.
- Implemented timesheet and invoice management system using Apex, Visualforce and salesforce portals.
- Created company website using apex, Visualforce and Force.com. Used Salesforce custom objects to make website more dynamic.
- Implemented Salesforce portal for employees to enable them to apply for holidays, maintain timesheets and update contact and job profiles.
- Implemented Salesforce portal for partners to provide project feedback and access invoices online.

### Client Background

- Award-winning, technology consultancy specializing in Financial Services and Commodities.
- Teams of sales, operations, recruiters and financial services consultants work in multiple geographies, to help financial institutes.

## Business benefits

- Decrease in level of duplicate information.
- Improved communication and information sharing across Sales, Marketing, Operations, HR and Management teams.
- Ease of entering new contacts, opportunities and employee details.
- Facilitated monitoring of interactions amongst contacts.
- Improved reporting capabilities.
- Improved project management, invoice generation, timesheet management and contract generation process.
- Reduced administration by integrating with website, customer and employee portals.

### About CloudChillies

CloudChillies' Salesforce certified professionals have the knowledge and passion to solve problems - big and small - and deliver Salesforce projects successfully and affordably. Our team has 15+ years of experience in all facets of Salesforce, covering cloud advisory, Salesforce integration services and Force.com platform development. We assess your needs to provide maximum value through IT to greaten your impact and achieve your mission.



Your Salesforce Consulting & Implementation Partner



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