

This case study details Overture's Salesforce Consulting solution for a fast growing, national service company with more than 1,000 locations and serving more than 100,000 customers.

THE CHALLENGE

To support and drive our client's rapid growth targets, its parent company decided to make a major investment, with the assistance of a big four consulting firm, to implement a new Salesforce solution. The plan was to implement salesforce across all business units, including Finance, Sales, and Field Service.

The project did not keep to expected schedules and results despite significant investment in time, money and manpower. Subsequently, our client shifted away from this approach and made significant changes. The new direction was to move away from the big four consulting firm, break the project into smaller, rapid, results based deliverables, and hire their own talent. When our client struggled to find sufficient qualified, certified Salesforce experts for newly created positions, they turned to Overture's Salesforce practice to deploy qualified Salesforce talent for the complex implementation project.

THE OVERTURE SOLUTION

The project "restart" began in consultation with Overture's Salesforce Program Manager to help with the project charter, planning and communications for the new rapid implementation approach for QTC, CPC and Sales Cloud. This included organizing and managing the overall project plan, and guiding business and vendor teams through the multi-phase implementations.

Overture partnered with our client in these key areas:

Salesforce Project Management

- A full Quote to Cash enterprise system upgrade, leveraging a cloud-based SFDC CPQ solution, including Apttus CLM, ServiceMax, MapAnything, Zuora and NetSuite
- Initial phase deployments for Sales Pipeline tracking (200+ Sales Reps nationwide on SFDC CRM), including import of leads from 3rd party sources, Outlook Email Sync, etc.
- Customer Care Case Management (160+ Customer Care Reps across 2 locations on SFDC Service Cloud,) including E-mail to case with Omni-Channel routing
- Salesforce R1 Go-Live

Salesforce Delivery Management

- Solution Architecture, Project Management, Stakeholder Management, and Change Management for Salesforce Deployment amongst business units in Sales, Customer Service, Finance, Marketing, AP/AR, and Operations
- CIO/CEO/ Stakeholder communication throughout each phase of deployment.
- Data migration from management systems/GPS Tracking Info/ Truck & Field Service Information to integrate with Navision
- Contingency Management to ensure that entire extended team is on the same page with timelines and documentation
- Dependency management: who is handling dependencies/reporting/management/permissions for change management
- Tableau (Recently acquired by Salesforce) Dashboard creation for CIO/ Finance/ Sales Business Units

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An Overture Partners Salesforce Consulting Solution, continued...

Salesforce Development

- Working with the VP of IT to help in develop code, create enhancements, assist with architecture, design, and implement various aspects of the Salesforce Integrations projects
- Facilitate the Zuora backend integration with Salesforce for functions such as “contract” creation, customer portal creation, Purchase Order creating, and agreements creation
- Requirements gathering, business communication, adding features, and creating enhancements for Service Cloud
- Write and translate Java code in Salesforce Automation for a “Lead Generation” application

Salesforce Business Analysis

- Gathering requirements
- Stakeholder communication

RESULTS

Through careful planning, communication and an experienced project team Overture has helped our client to successfully refocus and gain momentum in the Salesforce implementation.

- Our client’s CIO and Executive Leadership meet with the Overture Salesforce practice leaders for weekly 1-on-1’s, ensuring fully open lines of communication, project advancement, and mitigating the surprises, delays, and cost overruns.
- Sales Cloud and QTC have been successfully rolled out. CPQ is on track for a roll out later this year.
- Overture’s consultants are a first line of vetting for interviewing and technical screening of additional Salesforce implementation team members.

To learn more about Overture’s Salesforce consulting services, please contact:

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