



PwC Salesforce Case Studies

End to end process
digitisation for call
centres, stores, partner
organisations and sales
teams



Location:
Melbourne, VIC



Industry:
Telecommunications

Telecommunications Company

B2B & B2C Salesforce Implementation



What's the problem?

The client sought to digitalise their end to end processes across both their B2B and B2C businesses

- Our client has chosen Salesforce as their primary business support tool for customer facing staff in their call centres, stores, partner organisations and sales teams
- There are a number of Salesforce projects at the client with a key unifying theme of improving customer centricity, speed to value and productivity through digitisation

What we did...

PwC created a transformational roadmap to maximise their Salesforce investment, ensure security, and meet organisational compliance

- Strong business engagement by the architecture team with the business to ensure that the solution removed key pain points for the organisation and took advantage of the capabilities included with Salesforce Sales and Service Cloud licenses
- Integration and security approach determined by the Architecture team for the existing marketing automation and data warehouse solutions
- Facilitation of workshops to determine the enhanced Sales Pipeline and Opportunity management process including contract management
- Design of a new complaints and compensation management solution utilising Service Cloud Email to Case and SLA management functionality
- Formal engagement with the client's architecture council, security and privacy teams to ensure compliance of the solution to organisational policies, directives and guidelines

How did it do?

The solution delivered an improved uptake of Salesforce, resulting in better data quality and improved business insights

- Improved communications between sales, legal and customer onboarding teams
- Better sales pipeline information being entered in the system and improved communications between Sales, Legal and customer onboarding teams
- Reduction in complexity for the complaint management team allowing them to focus on resolving the customer's issue through improved automation and less re-keying
- The solution was delivered to meet the client's security standards and ensure structural separation was preserved
- De-risk contract management process by better understanding the contractual obligations across a portfolio of customers

Creating a central repository, for all customers and prospects for a leading Australian food manufacturer



Location:
Melbourne, VIC



Industry:
Food manufacturing

Food and Agribusiness Company

Single View of Customer



What's the problem?

The client needed to create a central repository for customers and leads, to provide visibility of all customers being managed between multiple business units

- Creation of a frictionless communications tool to take customer communications from a blend of emails, excel sheets, and post-it notes and facilitate sharing of IP across the business units
- Creation of a single view of information across business units to streamline and measure sales
- Provide a collaboration tool for teams to share ideas, wins and opportunities with each other outside of their geography
- Uplift the process for Sales teams to collaborate, share ideas and work with the Brand teams

What we did...

PwC took a broad view of the engagement meeting with global technology leadership and established the guiding principle of 'no customization', which meant PwC had to be innovative in crafting the solution

- Over a three month period PwC used an agile approach to deliver on two key themes: Remediation of the existing Salesforce platform & Creation of the Retail CRM solution
- Remediation of the existing Salesforce Org was necessary as several different suppliers had conducted changes on the platform.
- PwC's commitment to quality meant bringing the code back up to standard and establishing an acceptable level of controls and procedures over environments
- PwC's agile team used a blend of onshore and offshore team members to deliver the functionality for the Retail CRM project in several sprints

How did it do?

PwC delivered a quality CRM implementation, 100% on time and on budget

- All info in one place (one source of truth), and proactive customer service
- Data management & delivery of instant insights and recommendations
- Salesforce dashboards for home pages for different profiles
- Integration with Office 365 for calendar access
- Intelligently captures customer emails & communication with less email and phone queries
- Simplifies repetitive tasks & improved collaboration between departments
- Assists with aligning KPI's & Supports business continuity planning

Implementing a customer community and knowledge base to enable self service for a leading university


Location:
Melbourne, VIC


Industry:
Higher education

Public University Online Community

What's the problem?

The client needed to source a better way of engaging and interacting with their customer and enabling self service capabilities

- To implement a central repository for staff to access customer enquiries
- To replatform the legacy knowledge management system and transition to Salesforce to utilise new technology, and retire older, obsolete products
- Enable customers to self serve, as well as raised questions
- Enable the ability for specific internal teams to process enquiries containing sensitive security information

What we did...

PwC proposed a solution that not only enabled self service, but also leveraged their existing Salesforce Service Cloud investment

- PwC provided strong business engagement with the client to ensure that the solution removed key pain points for the organisation and took advantage of the capabilities included with Salesforce
- Utilised declarative programming as much as possible to provide succinctness and improve readability and usability
- Lightning components were used where possible to enhance the user interface

How did it do?

The solution provided increased processing efficiency and customer engagement through a revamped knowledge platform and enhanced user interface

- The retirement of obsolete products and a streamlined service to cut unnecessary costs
- Engagement with a larger audience segment through the addition of self serve options and the ability to ask questions
- Uplift in staff efficiency by providing a 360 view of the customers, and their enquiries, all in the one platform
- Overall we provided an engaging customer interface platform which enhanced usage frequencies and customer experience



Migration existing Sales Cloud to a Not-for-profit instance, and replacement of Campaign Monitor with Marketing Cloud



Location:
Sydney, NSW



Industry:
Health services

Health and Dietary Service Provider NFP Sales & Marketing Automation



What's the problem?

The client needed to migrate to a Salesforce Not-for-profit instance, and have a solution to cope with their increasing volume of website call requests

- The client's current Sales Cloud instance was not fit for purpose, there was a requirement to transition to a new not-for-profit instance of Salesforce Sales Cloud
- Call requests from their website were increasing to an unmanageable level for sales staff to call, and volume was anticipated to grow exponentially

What we did...

PwC worked with the client to develop a collaborative engagement where a local team worked together with the client to deliver a solution using Sales and Marketing Cloud

- Delivery of a configured Salesforce not-for-profit instance
- Migration from an existing Sales Cloud onto the new not-for-profit instance
- Delivery of Marketing Cloud, and migration of content from legacy marketing automation system
- Marketing Cloud Connect
- Automated lead nurture journeys, via Journey Builder and web-to-lead
- Contract generation, via S-Docs
- Integration to Facebook lead forms, via Lead Capture for Salesforce

How did it do?

The solution delivered fully functioning Sales Cloud instance, fit for purpose, with integration to Marketing Cloud

- The local team worked onsite, using a collaborative team approach, which aligned with client goals and the way their company preferred to engage with providers
- The new Salesforce instance aligned with business processes, and the transition to lightning gave the sales team renewed engagement with Salesforce
- Automated nurture journeys engaged leads generated from their website (web-to-lead) and from Facebook lead forms (Lead Capture for Salesforce)

Marketing cloud pilot,
followed by a Sales
Cloud implementation,
Marketing Cloud
Connect and Mobile
Connect



Location:
Brisbane, QLD



Industry:
Private clients

Property Depreciation Company

Automated Lead & Job Management



What's the problem?

The client required a new CRM to fit their growing business needs, however were hesitant after a series of unsuccessful custom CRM implementations

- The client is a leading provider of tax depreciation schedules. They help customers claim the maximum tax entitlements on their property and reduce their taxable income
- With unsuccessful CRM experiences in the past, the client was left with multiple legacy custom CRM systems which were expensive to maintain, and left them reliant on several third party IT vendors. This made them cautious about yet another CRM platform.
- The client also had a growing pipeline of leads being passed to them by referrers, and were unable to manage contacting all leads in a timely manor as volumes continued to grow

What we did...

PwC created a roadmap of release phases, targeting the client's biggest pain points first, to create incremental value and ensure they were comfortable with the platform

Phase 1 - Marketing Cloud implementation

- Email based lead onboarding journeys, created in Journey Builder, to manage and engage with leads and drive them towards converting into an opportunity

Phase 2 - Sales CRM implementation

- Migration from two legacy CRMs
- Marketing Cloud Connect
- Integration with website quoting engine, request a call, and other forms

Phase 3 - Mobile Connect implementation

- SMS added into journeys to facilitate client and supplier notifications

How did it do?

The implementation of Sales and Marketing Cloud created a single view of the customer and allowed the client to scale their business

- Single view of the customer, with all job and client information now stored in one system
- Reports and call requests can be made via the website, and are visible instantly in Salesforce
- Automated email journeys improved referral lead conversion rates and allowed the client to take on new referral partners
- Automated journeys also reduced the number of outbound calls required, freeing up staff to allow for more strategic initiatives and business development