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From Legacy to Next-Gen:

Navigating Digital Transformation in Salesforce Data Cloud for a Prominent Software Enterprise

Guardians of Data: Navigating Digital Transformation for a Safer Cloud Experience

Headquartered in the United States, this company stands as a prominent cloud-based software enterprise with a worldwide presence, dedicated to providing unparalleled solutions for its clientele. Committed to excellence, the organization actively pursues modernization and optimization initiatives, driving digital transformation across all facets of its operations.

Nevertheless, the company encountered several operational challenges. Chief among these were the paramount considerations surrounding data privacy and security. Given the ongoing concerns regarding storing customer data in the cloud, building trust was vital, underscoring the need for robust data protection measures.

Moreover, persistent challenges within the Data Cloud arise from unclean or inaccurate data, underscoring the imperative for continuous enhancements in data quality. Notably, the subscription-based cost structure has been perceived as a barrier, demanding continuous strategic evaluation to strike a balance between affordability and maximizing the delivered value.

Seamless Integration, Maximum Impact: Redefining Insights with Salesforce Wave Analytics

To achieve these objectives, the organization actively sought a capable partner to facilitate the migration of its marketing data from legacy environments to Snowflake. Furthermore, the ingestion of client data—spanning Customers, Trailblazers, and Prospects—into the CDP/Truth Profile platform was identified as a critical initiative. Leveraging an intimate familiarity with the intricacies of the D360 ecosystem, Brillio emerged as the optimal candidate. Brillio's expertise extends to prioritizing and migrating tables into D360, cultivating a comprehensive understanding of the end-to-end process, and meticulous documentation—positioning them as the ideal guide for the enterprise in this transformative journey.

To overcome the challenges and fully unleash the potential inherent in the process, the collaborative efforts of the combined teams yielded an exhaustive solution tailored to the Salesforce Data Cloud. This encompassed the strategic implementation of Salesforce Wave Analytics to enable on-demand report and dashboard generation for executive and finance teams. The solution streamlined lead, sales, and reporting processes, ensuring a harmonious integration without compromising other systems and maintaining the integrity of the Master Data Management (MDM) setup.

The collaborative teams also innovatively crafted components to enhance the overall user experience (UX) and facilitate easy access to information on demand. Additionally, the introduction of automated executive reporting, covering crucial metrics such as pipeline visibility, velocity visibility by stage, monthly recurring revenue (MRR) reports, quota attainment, and cohort analysis, further demonstrated the commitment to efficiency and real-time insights.

In order to uphold data integrity and reliability, a robust verification framework was instituted, ensuring that all relevant sources, in terms of accessibility, structure, and contents, are consistently available across the four environments, thereby facilitating seamless data ingestion processes.

> As a result of these initiatives, the project successfully reduced data clutter and elevated data hygiene standards, contributing to a notable increase in user adoption.

Salesforce Data Cloud: Transforming Sales and Customer Engagement

Centralizing sales and customer data sources provided a cohesive and unified foundation for strategic decision-making. This centralization, coupled with enhanced analytics through Salesforce Wave Analytics, enabled a deeper understanding of customers, facilitating the identification of trends and preferences.

The streamlined lead capturing, management, and tracking processes empowered the teams to efficiently reach the right audience, ensuring targeted and effective interactions. The introduction of automated lead assignment to sales representatives not only expedited response times but also improved overall lead management efficiency.

Furthermore, the system's robust features extended to opportunity management and sales progress tracking, elevating the precision of forecasting. Account management and customer interaction tracking functionalities provided a comprehensive view of each customer's journey, fostering stronger relationships.

Most notably, the platform's ability to personalize customer experiences underscored a commitment to tailored interactions, enhancing overall customer satisfaction and loyalty.

The implementation of Salesforce Data Cloud brought about a myriad of benefits, revolutionizing the organization's approach to sales and customer engagement.

25% Boost: Seamlessly Integrating Data for Impactful Campaigns

A remarkable 25% improvement in marketing and sales effectiveness was realized through the seamless integration and unification of data, empowering the execution of more targeted and impactful campaigns.

Complementing this success, a resilient Data Product Catalog was implemented, strategically linking source and target data essential for downstream dashboard solutions. This initiative established a holistic and well-organized data repository, enhancing accessibility and usability.

Moreover, the introduction of a Verification Framework ensured the consistency of accessibility, structure, and contents across all pertinent data sources in the four environments. This meticulous approach significantly bolstered data reliability and integrity, reinforcing the organization's commitment to maintaining high standards in data quality and accuracy.

40% Augmented Accuracy

60% Improved Data Hygiene

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ABOUT BRILLIO

At Brillio, our customers are at the heart of everything we do. We were founded on the philosophy that to be great at something, you need to be unreasonably focused. That's why we are relentless about delivering the technology-enabled solutions our customers need to thrive in today's digital economy. Simply put, we help our customers accelerate what matters to their business by leveraging our expertise in agile engineering to bring human-centric products to market at warp speed. Born in the digital age, we embrace the four superpowers of technology, enabling our customers to not only improve their current performance but to rethink their business in entirely new ways. Headquartered in Silicon Valley, Brillio has exceptional employees worldwide and is trusted by hundreds of Fortune 2000 organizations across the globe.

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