Streamlining Data Migration and Process Automation for a Leading Manufacturer

Optimizing Data Migration and Process Flows in Salesforce

CASE STUDY

Overview

This manufacturer of metal cladding has been an integral part of the largest building projects in America. The quality products, advanced LEAN manufacturing processes and dedicated customer service have elevated them to become the metal cladding supplier of choice. They faced several challenges transitioning to new systems and contacted rSTAR for help with data cleanup, data migration, data optimization, and automation of workflows.

CHALLENGE & SOLUTION

The Challenge

Data Migration and Cleanup:

They needed to migrate all customer and operational data from Omnimax to Salesforce while ensuring the data was cleaned and optimized for the new system.

End-to-End Process Migration:

The company needed to replicate its end-to-end processes from Omnimax in the new Salesforce org, ensuring all automation, workflows, and approval processes were seamlessly transferred.

Enhancement of Processes:

The transition also required enhancements to approval processes, case escalation, and data tracking, along with the setup of new reporting tools and dashboards.

The Solution

Data Migration and Cleanup:

Migrated all customizations to Salesforce platform, ensuring that automation, workflows, and approval processes were accurately replicated.

Improved Accuracy:

Resolved bugs from the integration of Form Assembly with Salesforce fields to ensure accuracy and efficiency in the data collection process.

Established New Email-to-Case Setup:

Established a new Email-to-Case system, allowing the company to manage customer queries across regions more efficiently.

TECHNOLOGIES OR SOLUTIONS INVOLVED

Salesforce Service Cloud

Salesforce Inspector

VS Code

Workbench

Forms Assembly

Excel & Google Sheets

OUTCOMES

100% Data Migration and Cleanup Completion
Successfully migrated and cleaned 100% of its data from Omnimax to Salesforce, ensuring that all critical customer and operational data was accurate and optimized for the new system.

30% Improvement in Process Efficiency
By automating workflows and approval processes and enhancing case escalation systems, the manufacturer saw a 30% improvement in operational efficiency. The automation streamlined day-to-day operations and allowed teams to focus on higher-value tasks.

35% improved Accuracy
With optimized data integration and regular data cleanup intervals established, the manufacturer was able to significantly improve the accuracy of its customer data, reducing data errors and inconsistencies by 35%. This improvement allowed the company to maintain better oversight of customer interactions and operational workflows.

15% Increased Visibility with Custom Reports and Dashboards
The new reports and dashboards provided enhanced visibility into customer data and performance metrics, allowing for more informed decision-making across the company. This resulted in a 15% increase in data visibility and actionable insights.

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