



## Case Study

# Strengthening brand image within FMCG industry through optimization of sales processes

Among our customers, there was a global corporation with almost 200 years of tradition in the FMCG (Fast-Moving Consumer Goods) industry. The company is the owner of dozens of the most recognizable brands delivering household and personal care products, among others, domestic detergents, toiletries, cosmetics.

The company employs over 100,000 people all over the world. The company was looking for an experienced implementation partner who is familiar with the Salesforce technology and can improve processes by following the internal standards applicable to the whole corporation. We were invited to the tender and won it thanks to, among others, our strong position as a Salesforce partner with a proven track record of successful implementations for international customers.



## What did the customer gain through implementation?

Improving brand awareness and strengthening its image among customers are the most important benefits of the project. We achieved this through the optimization of sales processes and the implementation of new functionalities for sales department employees promoting products in dental clinics. During a visit to the given clinic, a company representative uses an intuitive application helping to conduct a structured interview engaging a recipient.

### Challenge

We implemented the project in 13 countries for sales departments – teams responsible for promoting and educating about dental care products. The project's primary business goal was to increase brand awareness and recognition among dentists.

To achieve this goal, we increased the sales department's effectiveness by creating a more comfortable work environment. Sales (Territory) Managers and Professional & Scientific Relations (PS&RO) are responsible for promoting the brand among Key Opinion Leaders and students at the university schools of dentistry. For several years, on a daily basis, these two groups of users were using Salesforce Sales Cloud Classic. Both the tool and the processes based on this system required improvements. Together with the customer, we faced a challenge to limit the excessive customization and unnecessary fragmentation of business processes. Apart from that, the ongoing system optimization was more and more difficult because of, among others, the termination of cooperation with the current vendor.

Process unification and making the system more user-friendly were among the set business goals. At the very beginning of the project, we set precisely the User Experience (UX) requirements and standards that the system needed to meet.

We decided to approach the implementation from the helicopter view and advise on system solutions based on the best Salesforce practices. We wanted to achieve the set goals by, among others, migrating to the Salesforce Lightning Experience Platform and building a new interface using Salesforce Lightning Web Components. Together with the customer, we also decided to migrate users from two independent instances of Salesforce Classic into one built on the Lightning Component framework. Thanks to that, we unified the process and reporting.

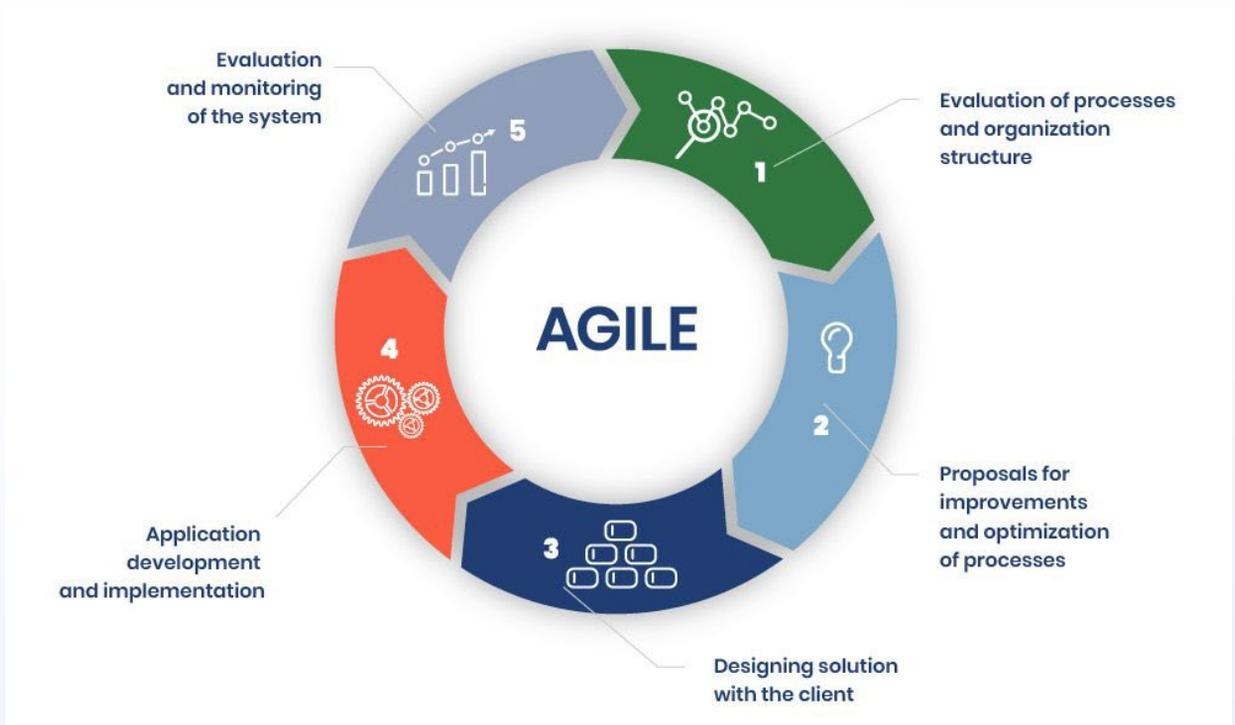
The aforementioned groups of users conducting field research directly with the customer were to be the main recipients of the renewed tool. Their task was to promote professional and semi-professional dental care products in clinics – recommending the products, training how to use them, and handing out samples. This group of users did not have basic sales targets set. They were accountable for the number of samples and kits distributed as well as the specialists' obligations to promote the brand. The visit data were transferred to sales taking place on a different channel. **Setting sales targets and measuring their achievement were the main challenges of the current system and reporting model.** The data was updated once a week. In the renewed system, it was important to take into account both the process of product promotion and reporting.

## Solution

The project was carried out following the Agile methodology. The work was spread over six months, divided into two-week sprints. During the sprint zero, we delivered the aforementioned migration of two independent instances of Salesforce Classic into one built on the Lightning Component framework.

We carried out a pilot roll-out in the British market. We supported the system adaptation by delivering training sessions both live (in London, Geneva) and online, and simultaneously conducted development for all markets.

Apart from the migration to Salesforce Lightning Experience and building a new interface using Lightning Web Components, the project also included the implementation of the Salesforce mobile application and training a specified number of users following the train the trainer approach – then, users can transfer knowledge to subsequent listeners. At the end of the project, we provided a detailed functional specification and comprehensive user guide.



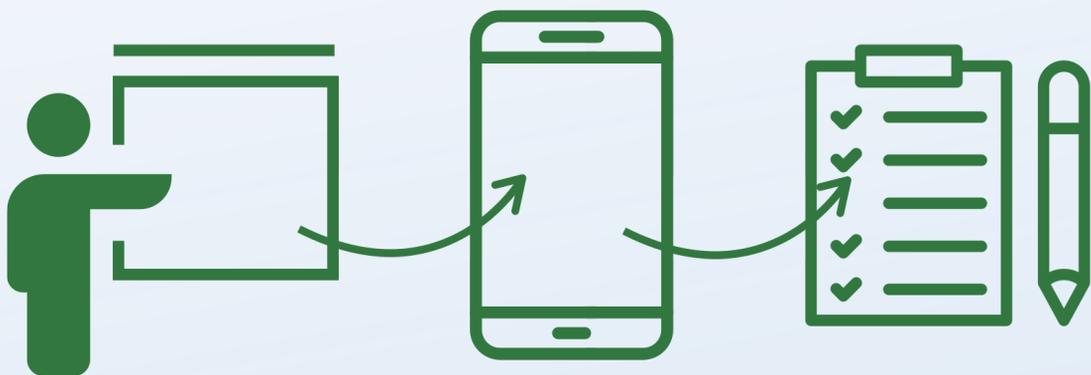
## Benefits

We achieved one of the most important implementation goals, that is, the optimization of business processes. Above all, we simplified and unified sales processes. Both employees and offer recipients took advantage of this implementation. We conducted the optimization in agreement with the Product Owner (PO) and end users. We kept or modified the functionalities identified as necessary by the PO and end users, and removed those that

were unnecessary or their use was unclear. Moving existing functionalities to the improved system took place during the migration to Salesforce Lightning Experience. Sales gained an additional benefit in the form of more accurate reporting. Thanks to that, it is possible to make strategic decisions without the need to interpret additional data. The improvement of the user experience was a very important project's goal. A dedicated mobile application improved the UX. The Salesforce Classic that was used before the implementation did not have a native mobile application. The users had to use the same interface both on mobile and desktop devices. Numerous fields and complicated processes didn't make work easier. Thanks to many interviews, workshops, and UX testing, we created a solution that fully supports both the work of Territory Managers and Professional & Scientific Relations (PS&RO).

It's worth mentioning, among others, about the Step2Success. The functionality was completely rebuilt to become more user-friendly. It facilitates users' work and increases brand awareness among dental care specialists.

How does it work? The Territory Manager (TM) is assigned to a region and works for dental clinics within this region. When the TM makes a presentation at the selected clinic, our application guides them through the process and indicates an obligatory action necessary at the given stage of the product recommendation. Immediately after the visit, the TM can sum its result up and attach the report to the system.



The course of the visit and presentation of products in the cabinet

The reporting module can precisely determine to whom and how many toothbrush demo sets, specific toothpaste samples, and other products were delivered during the aforementioned process (or other visits to specialists). Before the implementation, the sales results were updated once a week. After the implementation, most of them are updated on an ongoing basis in Salesforce. It is possible not only to analyze the results but also to monitor user activity regularly. After logging in to the application, users are visible in the system. The tool shows their location, automatically saves data about the start and end of their visit – all information is stored in the CRM.

The project was carried out before the pandemic. Currently, we continue working on it and aim to build an educational portal for dentists where they can access training resources, such as videos or webinars about new products. By using this portal, specialists will be able to independently order dental care samples. The portal is supposed to be an alternative option for specialists in case the pandemic restrictions return.



In this project, we had several major challenges both of a technical and strictly business nature:

- The end users worked in two separate instances of Salesforce Classic, and we aimed to migrate them to one solution built in Salesforce Lightning.
- Differences in business processes or the solution usage were visible even between countries grouped in one cluster.
- Reporting the degree of specialist’s commitment to the brand, and the number of delivered samples and demo sets were inaccurate and complicated.
- Due to the extent of changes, we had to pay close attention to adopting a new solution.

For me, it was a project during which I have learnt a lot. I led many workshops and training sessions for groups of 10-40 people both at the customer’s offices and online. Thanks to the great collaboration with the team and the customer, who was demanding but also knew what their expectations were, we have created a solution that provides many benefits:

- Territory Managers can always and everywhere complete tasks through the mobile application tailored to their specific needs.

- The reporting system with dashboards for each role-taking part in the process is clear. Each customer's representative can very quickly check how many recommendations they need to achieve the set goals within the given time.
- Through the collaboration with the UX team, we designed and built the Step2Success process that takes the customer representative through the presentation step by step. The goal of effectively conducted presentations is to achieve the maximum degree of specialist brand loyalty. Our solution definitely makes this easier.

**Paweł Sidorowicz,**  
**Senior System-Business Analyst in Craftware**

