



Implement | Integrate | Automate | Secure Salesforce Success Stories

27 Years of Service Excellence

Customer Success Story

CUSTOMER SIZE:

1000+

INDUSTRY VERTICAL:

High-Tech

SALESFORCE PRODUCTS:

Sales Cloud
Service Cloud
Tableau

INTEGRATIONS:

Slack
Jira
Prodpad
Live Agent
Zen desk

SALESFORCE LICENSES:

500+

ENGAGEMENT LENGTH:

1Yr+

Salesforce Org Merge - Merge Business Process and Existing Salesforce Orgs



Autodesk, Inc. is an American multinational software corporation that makes software products and services for the architecture, engineering, construction, manufacturing, media, education, and entertainment industries.

Original Challenge Autodesk was growing rapidly and has acquired 3 different subsidiaries. 2 of them already had salesforce for their CRM and one was using a different tool. They wanted to merge all those 3 instances into 1 for both Sales and Service division and then integrate with the Main Autodesk Salesforce org.

Outcome #1 Improved Data Visibility + Fast Deal Closing
Autodesk is now able to share the customers and their relevant opportunities between their salesforce instances to avoid people working in Siloes. It also reduced the deal closing time due to increased visibility and coordination between teams.

Outcome #2 Improved Customer Support and reduced SLA
Different support processed from those 3 orgs were merged into 1 single org thereby creating a unified Autodesk Customer service experience for users. And also, overall after utilizing the amazing features of Service cloud, overall SLA has been improvised along with CSAT.

Outcome #3 Seamless Integrations and improvised CRM
Autodesk has been able to utilize all their integrations with this new org merge as well thereby ensuring that all the business process were standardized ensuring the future scalability and upcoming acquisitions.

Customer Success Story

CUSTOMER SIZE:

500 - 1000

INDUSTRY VERTICAL:

High-Tech

SALESFORCE PRODUCTS:

Sales Cloud

Account Engagement

INTEGRATIONS:

Slacks

JIRA

PagerDuty

Opsgenie

Send-Safely

SALESFORCE LICENSES:

200

ENGAGEMENT LENGTH:

Ongoing - 4 Yr+

From ZenDesk to Salesforce – DataStax Partners with DynPro for Massive Data Migration



DataStax is the leading real-time data company – helping businesses becoming data-driven by mobilizing real-time data and building smart, scalable applications.

Original Challenge

DataStax was growing rapidly and facing limitations with their Zendesk Customer Service Portal. They decided to move to Salesforce and needed a trusted partner for a total migration +customization & integration.

Outcome #1

Improved Customer Satisfaction + Retention

DataStax is now able to provide full scale customer support without interruptions or delays. DynPro customized all service operation components in SF and migrated 15+ years of live customer data to SF – all without causing a Service Portal downtime for customers.

Outcome #2

Customer Support Automation + Self-Service

DataStax customers can access the community portal to start support cases. The level of customer support and accessible knowledge articles are automatically provided for the customer based on custom logic built according to customer type and subscription. Customers also receive case updates and surveys via email, Slack, and PagerDuty – keeping customers happy with seamless support case resolutions.

Outcome #3

Seamless Growth + Scalability

DataStax now has the ability to customize SF to meet their needs as they grow and expand – an option they did not have with their prior Service platform. They continue to work with the DynPro team to make design and functionality changes in their SF org.

Customer Success Story

CUSTOMER SIZE:

500 - 1000

INDUSTRY VERTICAL:

High-Tech

SALESFORCE PRODUCTS:

Sales Cloud

Account Engagement

CPQ

INTEGRATIONS:

Slack

JIRA

PagerDuty

Opsgenie

Send-Safely

SALESFORCE LICENSES:

200

ENGAGEMENT LENGTH:

Ongoing - 4 Yr+

DataStax Continues Partnership with DynPro to Customize Sales Process & Boost Efficiency Using Salesforce



DataStax is the leading real-time data company – helping businesses becoming data-driven by mobilizing real-time data and building smart, high-scale applications.

Original Challenge

DataStax offers many different database products to its customers – creating unique sales processes for each different type of product offering. Over time, this created multiple manual sales processes. DataStax needed a trusted partner to help them make Salesforce their efficient, effective sales solution.

Outcome #1

Improved Sales Team Performance

Thanks to DynPro, DataStax now has opportunity splits in Salesforce – allowing them to give credit where credit is due to Sales Team members. Real time access to sales data enables leadership to engage the sales team in ongoing performance improvement.

Outcome #2

Increased Sales Process Efficiency

DynPro customized CPQ to accommodate all Managed Service and Subscription offerings – giving the DataStax Sales Team automated flows for creating quotes and closing deals with accuracy and efficiency.

Outcome #3

Seamless Sales + Service Partnership

The success for DataStax doesn't stop with Sales. DynPro's custom logic to assign subscriptions and services sets accounts up to transition to the Service phase with all information needed to provide a personalized customer experience in Salesforce..

Customer Success Story

CUSTOMER SIZE:

51 - 200

INDUSTRY VERTICAL:

Manufacturing

SALESFORCE PRODUCTS:

Sales Cloud

Service Cloud

CPQ

Einstein

SERVICES:

Strategic Advisory

Salesforce Admin

Custom Development

SALESFORCE LICENSES:

150

ENGAGEMENT LENGTH:

Ongoing - 7 Yrs+

Seeing Clearly Now – NanaWall Sees Increased Market Profitability with Salesforce After Data Visibility Project with DynPro

NanaWall

NanaWall is an industry leader in developing and refining glass walls that visually harmonize with space, transform the architectural experience, and provide long lasting performance.

Original Challenge

NanaWall was struggling with inefficient Sales Operations due to poor data visibility and lack of real-time access to Customer Data. They wanted to leverage Salesforce as an all-in- one solution and engaged DynPro as a trusted partner.

Outcome #1

Increased Sales Team Productivity

NanaWall now has an automated, clear view to projects and progress details. This allows the Sales team to stay up to date and prioritize in real time. DynPro implemented SF Einstein Analytics Dashboards and a Case Management Dashboard – bringing Sales team productivity to a new high!

Outcome #2

Maximized Market Profitability

Thanks to the new dashboards, the NanaWall team now has a high-level view of Sales trends and performance. The team is able to leverage their data to predict coming trends and strategize on market opportunities in real time.

Outcome #3

Improved Sales Team User Adoption

DynPro eliminated incorrectly configured custom objects and replaced them with standard out of the box functionality – aligning the SF Org with CRM best practices. The NanaWall Sales team is seeing higher user adoption thanks to the user-friendly updates.

Customer Success Story

CUSTOMER SIZE:

200 - 500

INDUSTRY VERTICAL:

Banking

SALESFORCE PRODUCTS:

Sales Cloud

SERVICES:

Management Consulting
Custom User Interface
Custom Application Dev
Data Migration

ENGAGEMENT LENGTH:

Ongoing - Additional
Projects in progress

TAB Bank Makes Salesforce Their One-Stop Commercial Lending Solution with Help From DynPro



Original Challenge

Established in 1998, TAB Bank is an online bank serving small businesses, families, and individuals nationwide. TAB Bank is technology driven and focuses on providing support to its customers in all stages of financial growth – throughout any economic condition.

TAB Bank was looking to grow their SF org by moving all commercial real estate lending operations out of spreadsheets and into SF. They needed a partner to help them make the big move and customize SF to meet their needs.

Outcome #1

Seamless Lending Process + SF ROI

TAB Bank is now managing all commercial real estate operations within SF. The DynPro team customized SF to generate unique loan numbers and created custom opportunity screens. TAB Bank is seeing their SF ROI very clearly as their team is working more efficiently than ever with live data in SF.

Outcome #2

Custom Application + Increased Opportunity Visibility

DynPro created a custom commercial real estate app in SF, so the TAB Bank team can access data without having to look in multiple places. The TAB Bank team now has readily available access to account records and can utilize custom fields to see opportunities – all within SF.

Outcome #3

Streamlined Sales Operations

DynPro reviewed TAB Bank's lead conversion process in SF for efficiency. They were able to eliminate some unnecessary fields and create more effective custom fields – streamlining Sales Ops!

Customer Success Story

CUSTOMER SIZE:

100 – 500

INDUSTRY VERTICAL:

Banking

SALESFORCE PRODUCTS:

Sales Cloud

MuleSoft

SERVICES:

Management Consulting

SF Health Check

Data Modeling

Strategic Advisory

Architecture Repair

MuleSoft Integration Repair

ENGAGEMENT LENGTH:

Ongoing - Additional
Projects in progress

DynPro Strategic Advisory & Data Expertise Help TAB Bank Get Back on Track with Salesforce



Established in 1998, TAB Bank is an online bank serving small businesses, families, and individuals nationwide. TAB Bank is technology driven and focuses on providing support to its customers in all stages of financial growth – throughout any economic condition.

Original Challenge

TAB Bank's Salesforce solution wasn't yielding the results & ROI they expected when they implemented the system. The company needed an experienced partner who could diagnose & correct the problems they were having + help the TAB Bank team develop a strategic roadmap for growth and improvement.

Outcome #1

In-Depth Assessment Uncovers Foundational Issues

An in-depth Health Check revealed the source of TAB Bank's Salesforce performance issues: a bad data model & flawed architecture. This discovery set the stage for the next step in the process - fixing the most critical issues and developing a plan to increase SF ROI.

Outcome #2

Integration Repair Improves Online Banking Services

TAB Bank's online banking business depends on MuleSoft, but the existing MuleSoft integrations were faulty. DynPro repaired the integration, which significantly improved the efficiency and reliability of the online banking system.

Outcome #3

Strategic Roadmap Sets TAB Up for Future Success

The initial health check identified lots of challenges *and* lots of opportunities to improve Salesforce performance and get better business results. DynPro helped TAB develop a prioritized, strategic roadmap to correct the issues and get on the right path. Next step: execute the plan!

Customer Success Story

CUSTOMER SIZE:

200 - 500

INDUSTRY VERTICAL:

Professional Services -
Relocation Logistics

SALESFORCE PRODUCTS:

Sales Cloud

SERVICES:

Strategic Advisory
Data Migration
Custom Development

SALESFORCE LICENSES:

200+

ENGAGEMENT LENGTH:

Ongoing- 4 Yrs +

Save Now to Grow Later – CRS Temporary Housing Partners with DynPro to Find Cost Efficiency with Salesforce



CRS Temporary Housing (CRSTH) provides temporary housing solutions to individuals and families in need following unexpected events – offering emergency and long-term solutions within insurance policy allocations.

Original Challenge

CRSTH had been using SF over a decade and had hit a time of rapid growth. They knew the value of SF but needed to be more cost effective in order to keep up with the changing needs of the company. They needed a partner to help them find a way to decrease operating costs for SF, so they could continue growing the business for the future.

Outcome #1**SF Org Migration + Cost Effective Operations**

DynPro methodically migrated the SF Org from Unlimited to Enterprise while maintaining accuracy and quality of data. This reduced SF maintenance costs for CRSTH – making SF feel more manageable and sustainable for the long-haul.

Outcome #2**Data Migration Powers Efficient Workflows**

During the Org migration, DynPro was able to eliminate legacy data that was no longer needed. Only current, important data was moved. Now, CRSTH is working more efficiently with live data.

Outcome #3**Higher Salesforce ROI + Foundation for Future Growth**

Now, CRSTH is seeing SF ROI with their cost effective operations. They needed to scale back and focus on efficiency to enable future growth for the business – and their SF Org!

Customer Success Story

CUSTOMER SIZE:

200 - 500

INDUSTRY VERTICAL:

Professional Services -
Relocation Logistics

SALESFORCE PRODUCTS:

Sales Cloud
Experience Cloud

SERVICES:

SF Admin Support
Custom Development
Strategic Advisory

SALESFORCE LICENSES:

200

ENGAGEMENT LENGTH:

Ongoing- 4 Yrs +

CRS Temporary Housing Partners with DynPro to Keep Salesforce at the Center of Operations



Original Challenge

CRS Temporary Housing (CRSTH) provides temporary housing solutions to individuals and families in need following unexpected events – offering emergency and long-term solutions within insurance policy allocations.

CRSTH needed SF Admin support for ongoing maintenance and customization. They had an expanding list of SF needs as the business was quickly expanding. They decided to look for a trusted partner to bring on as a long-term Admin.

Outcome #1

SF Admin Support + Custom Dev

CRSTH had worked with Cloudayze on a previous project and knew them as a trusted partner. They decided to partner for the long-haul for SF Admin support. DynPro is now doing routine maintenance and is helping CRSTH plan and execute custom dev projects as the business grows.

Outcome #2

Custom Adjustor Portal + Efficient Claims Processes

DynPro built custom screens in Experience Cloud Community and moved all claim sharing operations into SF. Now, adjustors working with CRSTH have 2-way communication with CRSTH specialists and multiple people can access claims in one place – improving claims efficiency processes.

Outcome #3

UI Upgrade + Migration

DynPro migrated CRSTH from Classic UI to Lightning UI. The CRSTH team is now working more efficiently with the faster system and enhanced features.

Customer Success Story

CUSTOMER SIZE:

11 – 50

INDUSTRY VERTICAL:

Non-profit Education

SALESFORCE PRODUCTS:

Sales Cloud

Experience Cloud

SERVICES:

SF Admin Support

Custom Development

Strategic Advisory

ENGAGEMENT LENGTH:

It's a support package with
360 hrs. per year Support

BTNY's Success with DynPro and Salesforce Integration



Original Challenge

Breakthrough New York (BTNY), a nonprofit, aimed to guide talented kids from low-income backgrounds toward success. Founded in 1999, they provided educational support from middle school to college and careers. DynPro, a Salesforce partner, stepped in to assist BTNY in overcoming challenges.

BTNY encountered challenges with data accuracy and integration between Form Assembly and Salesforce. They needed to update key fields in Salesforce for better reporting accuracy while also addressing issues with Form Assembly submissions not reflecting in Salesforce.

Outcome #1

Integrating for Engagement

DynPro introduced new fields, updated logic, and aligned layouts, enabling BTNY to make informed decisions based on accurate student performance data. DynPro integrated Mailchimp with Salesforce, enhancing BTNY's community engagement through targeted outreach and improved communication.

Outcome #2

The Impact: A Transformed Journey

DynPro resolved connector discrepancies, ensuring accurate application statuses and a streamlined application process. With our solutions and Salesforce integration, BTNY could focus on nurturing future leaders while overcoming technical obstacles. This collaboration showcases the positive impact of technology in uplifting communities and changing lives.

Customer Success Story

Unifying Data and Boosting Efficiency with NPSP Integration!



CUSTOMER SIZE:

50 - 100

INDUSTRY VERTICAL:

Nonprofit Education,
Civic & Social Organizations

SALESFORCE PRODUCTS:

NPSP Success Pack

INTEGRATION:

Mail Chimp, 360 SMS App
Exchange App

ENGAGEMENT LENGTH:

8 Months

Original Challenge

StreetCode Academy empowers communities of color, bridging the digital divide through skills, mindsets, and networks. They create a community-based ecosystem, priming the next generation for a powerful impact on the tech industry, with accessible classes nationwide.

Streamlining constituent data processes for StreetCode Academy involved integrating diverse data from community members, students, donors, volunteers, foundations, corporations, and organizations into Salesforce. This required customizing a student registration object, implementing a volunteer recruitment system, and devising an advanced donor engagement strategy, all aimed at unifying data seamlessly.

Outcome #1

SCA partnered with DynPro to streamline operations through an NPSP transformation. This involved consolidating constituents, automating processes, and utilizing tools like SMS360 and Twilio for efficient student registration management. Integration with platforms such as Salesforce, WP-Fusion, MailChimp, Airtable, and Double the Donation optimized donor stewardship and volunteer matching, ensuring seamless data flow and heightened organizational efficiency.

Outcome #2

Streamlined NPSP App and Enhanced Automation
With our expertise, StreetCode Academy revamped its NPSP app, merging constituents and implementing streamlined automation. Salesforce's synchronized communication hub facilitates targeted plans, ensuring trust-building campaigns. Seamless data integration, including Double the Donation, enhances donor management, optimizing overall organizational efficiency.

Customer Success Story

CUSTOMER SIZE

5000 - 10000

INDUSTRY VERTICAL:

Software Development

SALESFORCE PRODUCTS:

Sales Cloud
Service Cloud
Experience Cloud

INTEGRATION:

Mulesoft (Already Integrated)

SALESFORCE LICENSES:

200

ENGAGEMENT LENGTH:

7 Months

Airbnb Enhances Operational Excellence and Efficiency with 24/7 Data Pipeline Support"



Original Challenge

Airbnb was born in 2007 when two Hosts welcomed three guests to their San Francisco home and has since grown to over 4 million Hosts who have welcomed over 1.5 billion guest arrivals in almost every country across the globe. Every day, Hosts offer unique stays and experiences that make it possible for guests to connect with communities in a more authentic way.

Airbnb encountered the dual challenge of securing 24/7 monitoring services for critical operations and optimizing user engagement. This involved overseeing data pipelines, ensuring seamless user onboarding, and enabling features while also assembling a dedicated team to streamline user creation processes, activate new features, and troubleshoot any issues. The goal was to maintain operational efficiency and ensure a positive user experience throughout their journey on the platform.

Outcome #1

Operational Excellence through 24/7 Data Pipeline Support
By offering a seamless 24/7 support solution by monitoring Airbnb's data pipeline, which is hosted by MuleSoft integration. Our proactive monitoring enhances data flow, preventing loss across multiple systems. This not only boosts data infrastructure reliability but also contributes to Airbnb's overall operational excellence.

Outcome #2

Streamlined Support and Enhanced Efficiency for Airbnb
By establishing a streamlined process for identifying and distributing open tickets, ensuring timely and effective support. This proactive approach enabled Airbnb to promptly address user issues. Additionally, our support extended to case management, claim management, and other Salesforce features, enhancing overall efficiency and user satisfaction.

Customer Success Story

CUSTOMER SIZE:

500 - 1000

INDUSTRY VERTICAL:

Hospitals
Health Care

SALESFORCE PRODUCTS:

Sales Cloud

SERVICES:

Sales Cloud
Web-to-Lead Form

SALESFORCE LICENSES:

200

ENGAGEMENT LENGTH:

6 Months

Loop Health Boosts Lead Generation and Sales Efficiency with Salesforce Integration



Loop Health, with its mobile app, facilitates seamless interaction between doctors and patients. The app enables quick sharing of patient history and reports, streamlining the opinion-making process for physicians. Loop Health aims to enhance healthcare quality, working towards India's first health insurance company offering unlimited doctor visits, preventative care, and constant access to a dedicated team of doctors via their app.

Original Challenge

Loop Health faces challenges in both lead generation and data accuracy, hindering sales efficiency. The lack of a systematic approach for lead tracking impacts flow and qualification, while non-standardized processes add complexity to pipeline management. To drive sales efficiency, a robust system with automated processes and clear pipeline visibility is essential for achieving a 360-degree view and improving CRM effectiveness.

Outcome #1

Efficient Lead Management and Enhanced Visibility

Salesforce integration empowers Loop Health with streamlined lead operations, enabling swift updates and management. The simplified qualification process, combined with real-time visit reports and mobile features, ensures the sales team enjoys unparalleled visibility, facilitating the quick conversion of qualified leads into opportunities.

Outcome #2

Elevated Collaboration and Visibility for Doctors and Patients

Loop Health improves collaboration between doctors and patients. Quick appointment creation, seamless data sharing, and online consultations save time for patients, fostering better healthcare interactions. The unified platform also provides management with enhanced visibility into the pipeline, driving teams towards closures and uncovering diverse business opportunities.

Customer Success Story

CUSTOMER SIZE:

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INDUSTRY VERTICAL:

Retail

SALESFORCE PRODUCTS:

Sales Cloud (Custom)

Lightning, Mobile

Professional Edition Platform, Chatter

INTEGRATIONS:

Chatter

ENGAGEMENT LENGTH:

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Automation of critical sales processes for Railway Projects



C.C. Engineers Pvt. Ltd., an Indian SME established in 1987 and incorporated in 1991, specializes in designing, developing, supplying, installing, training, and maintaining products for training and human resource development. Renowned for technical prowess, punctual project delivery, and effective after-sales support.

Original Challenge

Modernize C.C. Engineers Pvt. Ltd's technology stack to overcome manual processes, improve sales pipeline management, and enhance customer interaction and maximizing organizational growth.

Outcome #1

Efficient Sales Operations: DynPro's holistic digital transformation solution streamlined C.C. Engineers Pvt. Ltd's sales pipeline management, leveraging Salesforce features for quote management, work orders, and opportunity tracking. This enabled the sales teams to create quotes in real-time and share essential documents seamlessly, leading to a significant reduction in quote creation and delivery time from several days to just a few minutes.

Outcome #2

Comprehensive Salesforce Adoption: With the implementation of Salesforce CRM features and the utilization of its desktop and mobile versions by all 15 sales representatives, C.C. Engineers Pvt. Ltd achieved 100% adoption of Salesforce CRM. This ensured that management had a 360-degree view of the sales process, allowing them to track, measure, and analyze the time, money, and resources spent on each customer acquisition.

Outcome #3

Improved order management via Salesforce integration reduced delivery time, enhancing customer satisfaction. Streamlined internal communication and sales processes offered full sales process visibility, empowering effective strategy adaptation and driving growth.

Customer Success Story

CUSTOMER SIZE:

50 - 200

INDUSTRY VERTICAL:

Retail

SALESFORCE PRODUCTS:

Sales Cloud (Custom)
Lightning, Mobile,
Lightning Platform, Chatter

INTEGRATIONS:

ERPNext

ENGAGEMENT LENGTH:

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Sales Transformation with a Connected Salesforce CRM



Dhupar Brothers, established in 1990, serves as a mid-market channel partner for prominent Electrical Brands & EPC Contractors. They hold the distinction of being the largest channel partners for Philips and Legrand in the Western Region, and for over a decade, have been among the largest channel partners for L&T nationwide. With three offices in Pune, their team comprises over 15 sales representatives and 10 support staff.

Original Challenge

Develop an automated, integrated technology solution to streamline Dhupar Brothers' sales pipeline, CRM, and sales analysis processes, reducing manual efforts, enhancing customer communication, and expediting quote generation.

Outcome #1

Streamlined Sales Operations: By implementing a holistic digital transformation solution, including Salesforce for sales management and ERP integration for order fulfillment, DynPro reduced quote creation and delivery time from several days to just a few minutes. This streamlined process allowed Dhupar Brothers to maintain a healthy sales pipeline and move leads through to conversion efficiently.

Outcome #2

Comprehensive Salesforce Adoption: DynPro's solution led to 100% adoption of Salesforce CRM, both desktop and mobile versions, throughout Dhupar Brothers' organization. This ensured that sales teams had access to a 360-degree view of the sales process, from quote to cash, facilitating improved internal communication and a more streamlined sales process.

Outcome #3

Enhanced Visibility and Management: With the deployment of a custom sales cloud replica of the standard sales cloud in just 6 weeks, management gained 100% visibility into the entire sales process. This enhanced visibility allowed for better internal communication, fewer manual reconciliations, and the ability to track, measure, and analyze the time, money, and resources spent on each customer acquisition, enabling Dhupar Brothers to adapt and optimize their sales strategies effectively.

Customer Success Story

CUSTOMER SIZE:

200 - 500

INDUSTRY VERTICAL:

Non-profit Organizations

SALESFORCE PRODUCTS:

Sales Cloud

INTEGRATIONS:

Jitterbit Harmony

ENGAGEMENT LENGTH:

Support Project

Streamlining Invoicing and Integration: Overcoming Payment Delays and Efficiency Drain



ASCM is the global leader in supply chain innovation and organizational transformation. As the largest association dedicated to supply chain, ASCM and its members drive accountability for resilient operations. Rooted in world-class APICS education, ASCM offers award-winning workforce development, industry standards, and a diverse community united for a better world through supply chain excellence.

Original Challenge

Unsettled Invoices & Delayed Integration
Manual invoice generation led to unpaid invoices, demanding repeated reminders. Additionally, DynPro's Salesforce-Aptify integration, operating on a 30-minute schedule, consumed resources even during idle periods, posing efficiency challenges.

Outcome #1

Automated Billing Boosts Payments Revolutionizing the approach for ASCM, DynPro automated a monthly process that generates invoices and sends payment reminders to customers via email. If a payment is made, reminders are halted. This significantly benefited the ASCM team, resulting in increased payments compared to previous practices.

Outcome #2

Integrated Efficiency and Data Migration Mastery. We overhauled ASCM's Jitterbit system, transitioning from Jitterbit Studio to a new flow in Jitterbit Harmony. Additionally, we developed an API that Aptify calls, triggering the operation to create orders in Salesforce. This process is now real-time, only running when new orders are in Aptify. The solution proved cost-effective, saving time for ASCM.

Customer Success Story

CUSTOMER SIZE:

2 - 10

INDUSTRY VERTICAL:

Small Business

SALESFORCE PRODUCTS:

Sales Cloud

INTEGRATIONS:

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ENGAGEMENT LENGTH:

6 Months

Simplifying Sales Reporting and Deal Management for Rohan Enterprises

ROHAN ENTERPRISES

Rohan Enterprises is an industrial trading house. The company is involved in the sales & distribution of engineering products- industrial consumables and also capital items to manufacturing companies in and around Pune district.

Original Challenge

The customer needed a streamlined solution to receive daily sales reports for each salesperson, track visitor interactions and customer details across Leads and Opportunities, and maintain consistent follow-ups. They also required improved collaboration with regional heads to close deals, up-to-date records of quotes, visibility into achievement versus quota, and real-time deal tracking for management reporting.

Outcome #1

Worked with Rohan Enterprises to build a customized sales process on Salesforce. Configured a check-in/check-out feature, enabling the sales team to effectively track field activities. Meeting updates were simplified to make it easier to monitor deal progress. Additionally, we ensured the application was user-friendly to drive adoption and consistent usage across the team.

Outcome #2

Rohan Enterprises quickly adapted to the new technology, fostering healthy competition within the sales team to drive better performance. Reporting of daily sales activities became significantly simpler, allowing the team to easily track deals and monitor key performance metrics.

Customer Success Story

CUSTOMER SIZE:

2 - 10

INDUSTRY VERTICAL:

Real Estate

SALESFORCE PRODUCTS:

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INTEGRATIONS:

Web-to-lead

ENGAGEMENT LENGTH:

2 Months

Efficient Lead Capture to Opportunity Closure – Raivat’s Digital Shift



Raivat Property Advisory LLP, is a property consultant; they are grounded with good knowledge and experience in real estate; who connect with a large number of people and including developer, property owner, buyers, brokers, etc and keep themselves updated with current market trends. They are well versed with the law of the land and can help you complete legal formalities without any hassle.

Original Challenge

They needed a centralized system to manage leads from multiple sources, including websites, micro-sites, and third-party platforms like MagicBricks and Sulekha. They required Web-to-Lead implementation and training for their developers to support future site integrations. Their sales structure involved managers handling high-value clients and agents managing the rest, necessitating role-based access, opportunity tracking, site visit logging, and commission monitoring.

Outcome #1

Implemented Web-to-Lead and proposed Email-to-Lead to capture leads from various sources. Lead queues, assignment rules, and alerts were configured for timely follow-ups. A Property Master was set up to manage key property and developer details.

Outcome #2

We streamlined lead-to-opportunity conversion with clear stages, validations, and categorization. Opportunity pipelines, alerts, and role-based access were established. Security needs were addressed through role hierarchies and sharing settings.

Customer Success Story

CUSTOMER SIZE:

200 - 500

INDUSTRY VERTICAL:

Hi-tech

SALESFORCE PRODUCTS:

Einstein Analytics

INTEGRATIONS:

Salesforce Einstein Analytics

ENGAGEMENT LENGTH:

4 Months

Driving Operational Clarity with Salesforce & Einstein Analytics



Establish to help solve critical pain points for enterprise IT organizations and the managed service providers (MSPs) that serve them. The OpsRamp IT operations management (ITOM) platform allows you to see everything in your hybrid IT environment, take the right action faster with integrated event and incident management and automate with confidence with AIOps.

Original Challenge

OpsRamp lacked the operational expertise to manage their Salesforce setup, resulting in limited visibility into sales opportunities and project stages. They also struggled with creating and maintaining advanced reports and dashboards in Salesforce Einstein Analytics, and needed help consolidating and cleaning up existing analytics assets.

Outcome #1

Provided day-to-day administrative support for OpsRamp's ongoing Salesforce change requests and trained their team on operational tasks to manage and maintain the Salesforce platform effectively. This helped stabilize their internal processes and improved adoption and usability across teams.

Outcome #2

Designed and delivered advanced Salesforce Einstein Analytics reports and dashboards to help OpsRamp visualize business data across multiple dimensions. With real-time insights into opportunities and project pipelines, OpsRamp's executives can now monitor team performance, track forecasts, and make informed decisions based on accurate, segmented data.

Customer Success Story

CUSTOMER SIZE:

2 - 10

INDUSTRY VERTICAL:

Non-profit

SALESFORCE PRODUCTS:

NPSP

INTEGRATIONS:

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ENGAGEMENT LENGTH:

1 Months

Empowering Impact: Automating Volunteer & Program Management with Salesforce



Created since 2012 a project that aims to create wells in regions without access to drinking water. TOGETHER, they will continue to create wells to as many Guineans as possible to significantly improve their living conditions.

Original Challenge

Relied heavily on Excel spreadsheets for all their daily operations, leading to significant time consumption and inefficiencies due to manual processes. They lacked an automated solution to streamline their tasks, which hindered productivity and scalability.

Outcome #1

We led a complete digital transformation for the client by migrating their business processes from manual Excel-based workflows to Salesforce. This significantly improved efficiency and enabled automation across their operations. We also implemented the "Volunteer for Salesforce" solution, setting up Donation and Volunteer Campaigns to support their mission-driven activities.

Outcome #2

We configured Program Management in Salesforce to help the client track music concerts, including locations, artists, participants, and related expenses. Additionally, we provided end-to-end Salesforce training for their team, ensuring a smooth transition and empowering them to manage their new CRM platform effectively.

Customer Success Story

CUSTOMER SIZE:

2 - 10

INDUSTRY VERTICAL:

Non-profit

SALESFORCE PRODUCTS:

NPSP, Donnor Acknowledgement

INTEGRATIONS:

Mail chimp

ENGAGEMENT LENGTH:

1 Months

Revolutionizing Donor Experience: Building Bridges with Data



Develops and implements international programs to empower individuals with knowledge often suppressed by authoritarian regimes and dictatorships. By encouraging youth and young adults to think critically about topics ranging from human and civil rights to science and reason, IBB is laying the groundwork for people to retain their cultural identities while questioning the status quo, pushing back against extremist hate and violence, and finding their own unique voice.

Original Challenge

They lacked automated donor acknowledgment, especially for high-profile donors or large donations. There were no email alerts when new donations were added in Salesforce, and contacts were not segmented for targeted marketing. Additionally, the Do Not Contact (DNC) preferences were not configured, making it difficult to manage subscriber communications.

Outcome #1

Donor acknowledgment was automated for high-value contributions, with personalized emails sent via platforms like GoFundMe and PayPal. Email alerts and tasks were also set up for donor managers to ensure timely follow-ups.

Outcome #2

Mailchimp was integrated with Salesforce for real-time sync of audiences and unsubscribes. The team can now segment contacts for targeted campaigns, send emails from either platform, and view bounce reasons directly in Salesforce.

Customer Success Story

CUSTOMER SIZE:

11 - 50

INDUSTRY VERTICAL:

Non-profit

SALESFORCE PRODUCTS:

NPSP 3.0

INTEGRATIONS:

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ENGAGEMENT LENGTH:

2 Months

Scaling Nonprofit Impact: NPSP 3.0 Migration Fuels Growth for Global Visionaries



Original Challenge

Global Visionaries is a non-profit organization who invites youth from diverse socio-economic, racial, and ethnic backgrounds to be active leaders in their local and global communities. We foster leadership skills grounded in environmental and social justice.

They needed to migrate from the NPSP 2.0 Household Model to the NPSP 3.0 Account Household Model. However, their existing data required extensive sanitization and transformation. They faced significant challenges due to scattered and duplicate contact and household records, which impacted operational efficiency. Comprehensive data deduplication, cleansing, and restructuring were critical for a successful migration.

Outcome #1

We successfully migrated the client from the NPSP 2.0 Household Model to the advanced NPSP 3.0 Account Household Model. This upgrade enabled them to manage their operations more efficiently with an improved data structure tailored for scalability.

Outcome #2

As part of the migration, we performed thorough data sanitization, transformation, and deduplication. These steps were critical to ensure a clean and accurate database, significantly reducing manual effort, improving contact management, and enabling a smoother and faster workflow post-implementation.

Customer Success Story

CUSTOMER SIZE:

1000 - 5000

INDUSTRY VERTICAL:

Banking Services

SALESFORCE PRODUCTS:

NPSP 3.0

INTEGRATIONS:

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ENGAGEMENT LENGTH:

2 Months

Unlocking CRM Value: From Gaps to Growth at First Tech



First Tech exist to serve our members, not to make a profit. Instead, we put our time, money, passion, experience, smarts, elbow grease and whatever else we can muster up to work for our members, employees and communities. It's our secret weapon that turns promises into action: investment in you.

Original Challenge

The client's Member Resource Management app on Force.com had low sales team adoption, poor opportunity attribution, and a fragmented architecture. Tasked with auditing the system, identifying gaps, and proposing a recovery plan. The client aimed to rebuild their CRM to support a unified Member 360 view, integrate financial systems, and streamline sales, segmentation, and self-service processes.

Outcome #1

Identified key process and technology gaps in the client's existing Salesforce implementation. We delivered detailed architecture and design artifacts including Application Architecture, Data Architecture, and Integration Architecture to support the remediation effort. In addition, we provided technology management services to guide the FTFCU Salesforce development team during implementation.

Outcome #2

We provided ongoing technology management services to the FTFCU Salesforce development team, offering guidance and oversight to ensure successful execution of the redesigned solution.

Customer Success Story

CUSTOMER SIZE:

11 - 50

INDUSTRY VERTICAL:

Non-profit

SALESFORCE PRODUCTS:

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INTEGRATIONS:

Web-to-lead form

ENGAGEMENT LENGTH:

2 Months

Empowering Purpose-Driven Missions with Salesforce



Eagle Rock Camp, brings military families together to heal and reconnect in their communities, restore their hope and emerge as an empowered, purpose driven unit

Original Challenge

They manually entered application data from email into Apricot CRM due to the absence of a Web-to-Lead form, causing inefficiencies. Additionally, Apricot CRM was not cost-effective, prompting the need to migrate to Salesforce for better automation and value.

Outcome #1

We created a Web-to-Lead form on the client's WordPress website, enabling camp applications submitted online to be captured as Leads in Salesforce. Additionally, we configured the integration plugin to ensure seamless data flow between WordPress and Salesforce.

Outcome #2

We successfully migrated the client's data and business processes from Apricot CRM to Salesforce. A custom data model was also designed in Salesforce to help them efficiently capture and manage interviews with military personnel.

Thank You



Headquarters

Corporate Headquarters

8045 Arco Corporate Drive, Suite 370
Raleigh, NC – 27617, USA

Silicon Valley Headquarters

3150 De la Cruz Blvd # 200 Santa Clara CA
95051 USA

India Headquarters

The Estate, 101, 3rd Floor, 121, Dickenson Rd, Near Manipal Centre, Bengaluru, Karnataka 560042

Canadian Headquarters

88 Queens Quay W, Suite 2500
Toronto, Ontario – M5J 0B8, Canada

UK/European Headquarters

Prima House 267 Banbury Road
Oxford, UK OX2 7HT



<http://www.dynpro.com>

For general queries: info@dynpro.com



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