



Customer Success Story

Client improved **user experience, simplified and automated their sales process to improve user adoption**

About the Client

The client is a global technology company offering data-driven acquisition equipment for better decision-making. They also provide vessel steering technology and geological services.

Solution

- Engaged with the client to understand their sales process to align with the standard operating procedure and provide an optimized user experience.
- Reduced multiple customizations and simplified role hierarchy to determine the levels of user access and control data visibility.
- Their Salesforce instance was migrated from Salesforce Classic to Lightning to enhance productivity, usability, and management.

Benefits

- ✓ Optimized Sales process and increased automation improved the user adoption.
- ✓ The migration to lightning improved the user experience and enabled the client to leverage additional functionality in Lightning.