



# SALESFORCE AND SALESFORCE CUSTOMER COMMUNITIES IMPLEMENTATION

XTIVIA aligns plumbing distributor, Plumbers Supply Company, with local plumbing companies for enhanced automation, collaboration, and data visibility through their consulting engagement and implementation of Salesforce and Salesforce Customer Communities as their materials and project management application.



## Legacy Systems Integration

After 92 years of being in business, Plumbers Supply Company has accumulated decades of historical data in their back-end inventory and accounting system. This data was not actionable and there was exclusive reliance on phone conversations to distribute data to their customers. Through several iterations and data cleansing efforts, there is now a seamless, real-time integration from this system into Salesforce.

## Chatter, Quick Actions

Data exposure was just the beginning. Establishing a database architecture of appropriate data relationships opened a channel of collaboration around information that was once difficult to obtain. Quick actions with predictable outcomes advanced processes, updated information on the fly and created executables with greater visibility into the actions and enhanced the productivity of the team.

## Mobile Ordering – Text, Image & Video

The business and industry needed a fully customized application with an enhanced user experiences and business rules to drive adoption. This integral feature was launched simultaneously for their customers to expedite requests and orders. Internally, Plumbers Supply had complete visibility to the voice of their customers and was better suited to fulfill their needs. Through text, image and video mediums, customers were able to clearly articulate their message; and criteria based assignment ensured these requests were handled by the appropriate staff member.

## Project Management – Next steps, notifications

Different project types were configured to deliver relevant information, in real time to the appropriate project stakeholders. There was now an immediate way in place to expedite the process of acting on and fulfilling the next steps in the project. The entirety of the system functions together and draws upon the functionality to exceed their customers' expectations at all levels.

## Customer Community

Exposing internal data to their customers was a task that was not taken lightly. Data integrity was paramount, as was data security to ensure the right information was delivered to the right person at the right time. Leveraging and configuring the Salesforce Community allowed more efforts to be focused on branding and data delivery as opposed to backend security architecture. Furthermore, pre-existing user interface templates and overall formatting allowed for rapid deployment, ease of training and quicker user adoption. Seamless integration with the internal Salesforce instance tied everything together with minimal expenditure as compared to developing a customer portal from scratch.

And the process continues. As the organization continues to evolve, Salesforce evolves. Through a carefully orchestrated change management process and ongoing consulting arrangement, Plumbers Supply Company will continue to grow by adding functionality, expanding utilization into new departments and finding new ways to attract, retain and sell to their customers.

## CRM OVERVIEW

XTIVIA's knowledgeable CRM team has more than 90 years of combined experience in customizing and integrating CRM systems for companies of all sizes, crossing all industries. We offer multiple CRM systems, an extensive list of enhancements and superior integration skills—all the necessary ingredients to empower your organization to dramatically improve the customer experience. Our industry-leading live support and certified CRM training add another dimension of excellence to our CRM offering, expanding our ability to deliver effective solutions and drive outstanding results for your organization.

