



Salesforce Integration

Integrify and Salesforce Case Study



A large security infrastructure service provider needed a better way to assign a specialized team to respond to sales opportunities. This first meant gathering staff from the relevant tech teams, sharing materials related to the opportunity, and supporting communications among team members. Then they needed to pass all the gathered information to an approval matrix based on dollar amount, territory, technologies, and several other criteria. This was all done manually, with no automation and required manually entering information in Salesforce.

Requirements

- Extensive Salesforce and database integration with Integrify.
- Automation of the creation and assignment of IT resources/programmers to manage client engagements.
- Data integrations to list available resources and skill sets.
- A portal for project managers to assemble resource teams in alignment with project requirements.
- Multiple levels of review for team supervisors and senior management.

Implementation

- Automatically launch an Integrify team assignment workflow when a new Salesforce opportunity is created.
- Use evaluation criteria and business rules to determine the path of any request.
- Assign specific tasks to team members based on the opportunity details.
- Send time trigger or action trigger alerts to Salesforce and non-SalesForce users as workflow tasks are completed.
- Perform a field update of Salesforce records related to the project opportunity with real-time status data.

Quote from the Vice President, IT Operations

“Integrify allows us to standardize processes nationally with custom data and configuration. Not only is the tool easy to use, but the many options also allow for advanced features like two-way integration through APIs to other cloud or on-premise applications. The professional services and support teams are creative in solving complex problems, have timely responses, professional, and are easy to work with. The customer success team is REALLY great. Approachable, knowledgeable, and interested in getting to the right solution. Truly the best I have worked with.”

