



# SalesFix

Sensis Data Solutions wanted to better leverage their Salesforce platform to improve the experience of internal and external stakeholders. The implementation of automation processes and dashboards have reduced manual handling and improved efficiency. As a result of these internal improvements, customers are benefiting from a smoother experience with Sensis Data Solutions, as evidenced by an increased NPS.

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Data Solutions

## KEY BENEFITS

### SEAMLESS

Quality information collected by the Sales team is easily available to the Product Delivery team, allowing for greater collaboration. This helps to create a better customer experience with faster delivery of solutions.

### AUTOMATED

By connecting document generation components to the existing Salesforce platform, the need for manual handling by both internal and external stakeholders has been reduced. Internal teams can update statuses and create work cases that are visible to everyone. Contracts can be generated from one system, enabling customers to digitally sign and return documents automatically.

### EFFICIENT

Processes have become significantly more efficient. Sensis Data Solutions have been able to reduce staff costs, whilst improving the customer experience.

## THE CLIENT

Sensis Data Solutions is a division of Sensis Pty Ltd that offers a range of data services. They help their clients connect with customers and achieve business goals through data validation and data cleansing, as well as other data enhancement tools.

Typically working with medium and enterprise level organisations, Sensis Data Solutions have many years of experience in various industries, including the automotive, retail, government, not-for-profit, and political communication sectors.

## THE SITUATION

Sensis Data Solutions has its own bespoke Salesforce environment, with Sales and Product Delivery teams regular users of Salesforce.

Despite having access to Salesforce since 2012, Sensis Data Solutions were still individually generating forms to capture the services for a customer. Complete documentation was created using separate template documents.

Customers were then required to manually handle and execute a hard-copy contract before returning it to Sensis Data Solutions.

Once a contract was returned, the Sales team would have to manually submit a request to the Product Delivery team to execute the contract. On some occasions, there were discrepancies between the request from the Sales team and what was stated in the contract.

This process was not only inefficient for the Sales and Product Delivery teams, but also posed a risk of less-than-perfect customer experience and delay in closing revenue.



*"We came to SalesFix with big plans and not a huge amount of time to micro-manage a program of work. SalesFix were able to provide industry expertise, outside-the-box thinking, and project management capabilities that were absolutely critical to our project's success."*

**Jonathan Hart, Sensis Data Solutions.**



SalesFix

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## THE CHALLENGE

In 2018, Sensis Data Solutions began evaluating ways to better use Salesforce. They wanted a solution that would benefit their customers, and improve the contract and delivery processes. This all needed to happen within Salesforce and work with its connected apps.

The project scope for SalesFix was broad. There were numerous aspects of Salesforce to review, and time constraints to implement immediate fixes. A lot of ground work needed to be covered before we were able to develop a solution that would allow Sensis Data Solutions to reap the rewards of the automations and improved processes.

After some initial work using an agile approach in the early project stages, SalesFix was able to facilitate a structured project management approach based on clear user stories and desired project outcomes. This was translated into clear project controls and timelines that both SalesFix and the Sensis Data Solutions project team could work towards.

## THE SALESFIX SOLUTION

Initial planning took place in workshops where SalesFix identified issues and clarified outcomes and priorities that Sensis Data Solutions needed. Milestones and release dates were set, taking into account resource availability. We were able to successfully meet these timeframes, despite unexpected challenges such as the impact of COVID-19 on businesses.

Although Sensis Data Solutions had already implemented Sales Cloud and Service Cloud, we helped to finalise their Salesforce Lightning migration. Sensis Data Solutions became the first unit within Sensis Pty Ltd to be 100% Lightning enabled.

SalesFix also helped Sensis Data Solutions build functionality, including case creation automation, dashboards for reporting, and, most importantly, a platform to easily generate customer contracts that could be sent electronically for execution.

## THE OUTCOME

Sensis Data Solutions were able to clearly identify the problems that affected their teams and customers. This allowed for all necessary tasks to be included in the project scope, and to be successfully completed.

Initial communication and timeline challenges were overcome by SalesFix implementing and communicating transparent project controls and assigning a dedicated project manager. The Head of Product Delivery for Sensis Data Solutions was also heavily involved in the project, which aided overall project management and faster decision making.

The new processes have created significant efficiencies within Sensis Data Solutions, allowing for better outcomes with less staff time required.

## RESULTS

The improvements made by SalesFix have significantly improved Sensis Data Solutions processes, and translated to positive outcomes for customers. Sensis Data Solutions was able to increase their NPS rating as measured by customer surveys by 50. This was clear evidence of their success in improving their customer experience. From internal communications to product upgrades, Sensis Data Solutions are dedicated to making enhancements so they can help customers succeed with data quality.

At a more functional level, Sensis Data Solutions team members are working more efficiently, allowing them to focus on higher-value tasks. Business stakeholders have endorsed their project improvements, with strong support from the people within Sensis Data Solutions who use Salesforce daily.