

State Government Department

Aspiring to make the most of Salesforce, beyond the capabilities of its inhouse IT expertise, the regulator of a Victorian state government department turned to Simplus Managed Services in order to unlock the full potential of Salesforce Lightning.

Services:

Salesforce Managed Services

Salesforce Products:

Partner Community

Experience Cloud

Sales Cloud

Service Cloud

THE CHALLENGE:

The regulator's small team of 14 relies on Salesforce Sales Cloud to manage all of the government department's regulatory processes, which includes tracking complaints, decisions and resolutions.

With all information flowing through Salesforce, the system also provides a range of business intelligence, such as the ability to monitor performance and report on trends in the types of complaints the regulator receives.

Extending Salesforce's capabilities

One issue was the difficulty in making changes to its bespoke Salesforce implementation in order to improve processes, says the department's Regulation Manager.

"As a regulator we're reliant on our systems to give us the information we need, when we need it, but that was a challenge," she says. "We lacked the in-house skills to drive the required improvements."

Her team is supporting several major state government initiatives, which makes working

effectively and efficiently important, along with understanding the sector and responding quickly to emerging issues.

"Our very small team did a fantastic job with the capability they had, but we don't have IT expertise, and it means that we weren't getting the efficiency and productivity that we could or should have been getting from our Salesforce system," she says.

"Changes were slow and potentially not made in the most beneficial way, but it would be difficult to make the business case for having a staff member dedicated solely to that work."

“With our Salesforce managed services arrangement with Simplus, we're not constrained by the system as it currently looks – we can make changes if we need to, in order to improve processes and support new initiatives.”

THE SOLUTION:

The regulatory team engaged Simplus to upgrade its system from Salesforce Classic to Salesforce Lightning. Along with adding several advanced features, Salesforce Lightning provides a more modern user interface and makes it easier for businesses to create custom reports and dashboards.

Since the upgrade, the regulatory team has continued to engage Simplus Managed Services, not just for technical support but also to get more from the Salesforce platform. What began as a simple maintenance contract with 40 hours of development engagement, has moved increasingly to micro projects with a focus on enhancements.

“A good portion of our work with Simplus is forward-looking and focused on performance enhancements, rather than just keeping the lights on with break-fix support,” says the department’s Regulation Manager.

“We’ve tended to work with Simplus on important micro projects and developments, so we can more easily make changes to the business and its processes, and support those process changes with system improvements.”



Improving Salesforce reporting

Working with Simplus has underpinned the introduction of capabilities in terms of new dashboards and reporting.

“At the moment we are going through quite a lot of changes and reconsidering our processes, in order to determine how to work more effectively while delivering the highest standard of regulation,” she says.

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Strengthening support relationships

This requires a managed services partner which truly understands the organisation, its goals, processes, systems and limitations. One of the keys to success was empowering one internal team member to take ownership of the partnership with Simplus, she says.

“I recommend to anyone who’s setting up this sort of arrangement to find the person in your business who is really a great system process thinker,” she says. “Building that relationship between the Simplus Managed Services team and that staff member has been really fantastic.”

“That staff member can identify the business requirements and then take ownership of working with the Simplus team to make sure that it translates to what we see in those system changes.”

“Working with Simplus to unlock the potential of Salesforce has certainly made our team more productive and efficient.”

THE OUTCOME

Working in conjunction with Simplus has made the regulator more agile and responsive. Along with ensuring that staff members have easier access to all relevant information to perform their roles, Salesforce now supports a range of automations for previously manual, time-consuming processes.

This includes automatic checks for essential documents and automatically issuing notices when items expire or require updating.

“Working with Simplus to unlock the potential of Salesforce has certainly made our team more productive and efficient,” says the department’s Regulation Manager. “Team members are now more confident with the system and are engaging with its advanced features in order to unlock more value.”

“Streamlining processes while making things more intuitive has had a range of benefits, from increasing our visibility to management through to increasing accountability across the board thanks to the ability to quickly identify when work is outstanding.”

Looking to the future

Beyond improving current processes, the increased confidence in using Salesforce has also given the regulator the confidence to look ahead and develop a plan for future enhancements.

Simplus Managed Services has opened up the way the regulatory team can think about process improvements, she says.

“We’ve had many conversations with Simplus about what we’re hoping to do, what that looks like and how we can best use managed services to achieve those goals,” she says. “Now if we need to change processes we can make those adjustments with Simplus’ support, and it’s no longer the daunting challenge it once was.”

“We’ve been very well supported by Simplus and have been given really good guidance for what is achievable, where we should be focusing our attention and energy and where we can best use our resources.”

Key benefits of the relationship include:



Complementing in-house IT skills to drive process improvements.



Focusing more on delivering micro projects and enhancements.



Implementing new dashboards for improved analysis and reporting.



Looking ahead to plan future enhancements.

Learn more about how Simplus partners with organisations to maximise the value of Salesforce.

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