

Success Story

How Exavalu Helped a Large US Enterprise with Smooth Salesforce Migration and Maximization

Objective

A large US Enterprise struggled with transitioning its legacy internal systems to Salesforce. They partnered with Exavalu for additional support to complete their entire transformation project within a given timeframe and budget.

Services Offered

Business Advisory

Technology Advisory

Program Management

Challenges

Their existing legacy system lacked both scalability and flexibility to support process updates and modernization. Their limited visibility into key KPIs hindered resource optimization across employees, volunteers, and logistics.

Disparate data sources and disconnected systems such as SharePoint, Excel spreadsheets, and hardcopy reports created further inefficiencies in the overall planning and execution. The absence of a centralized database prevented seamless consolidation of operational data, leading to fragmented insights and delays in real-time decision-making.

Additionally, the lack of modern capabilities restricted visibility into scheduling, PTO, and resource allocation. The absence of automation and the reliance on manual processes deepened our client's challenges. It created communication gaps, impacting overall efficiency.

How Exavalu Made an Impact

We implemented Salesforce Sales Cloud to streamline campaign management and enhance operational efficiency. This helped our client schedule campaign pipelines several months in advance. We brought in Skedulo - a Salesforce AppExchange product. It optimized scheduling based on site type, vehicle size, resource mix, and availability.

We also introduced Salesforce Automation to auto-populate schedules and allocate tasks using historical data trends, reducing manual effort. MuleSoft facilitated seamless, bi-directional data flow between Salesforce and external systems, ensuring real-time data synchronization.

We deployed our core solution in a single region before a rapid, phased rollout to ensure a smooth transition with minimal disruption.

Impact

- Improved resource utilization for seamless execution of donation campaigns on a scale.
- Enabled faster responses or notifications to customers to improve engagement and satisfaction.
- Delivered a centralized platform for multiple teams to plan and execute donation campaigns more efficiently.
- Enhanced reporting capabilities to identify high-performing donation campaigns and guide strategic business decisions.
- Developed scalable solution to support faster and more efficient rollout of future enhancements.
- Increased the number of donation campaigns conducted without altering capacity levels.

Metrics

7000+ Active Salesforce Users

180,000+ Scheduled Donation Campaigns with Optimized Resource Allocation

40+ US Regions Served

1 Unified Platform and a Mobile Solution for Field Resource