Sinergify

CASE STUDY

Improved Communication, Collaboration, and Transparency Between Salesforce® and Jira Users

HIGHLIGHTS

- Tailored implementation of Sinergify with some customizations
- Reduced friction between support and engineering teams
- Lowered manual efforts with automated support workflows
- Improved transparency with Sinergify's reporting capabilities

The Customer

The customer is an IT company based out of California, USA. The company is a leading software provider of data management products and is valued at over $2 billion with thousands of customers around the globe. Their products allow professionals to backup, manage, and gain insights from data across platforms. The customer also enjoys global recognition from Gartner and the World Economic Forum.

The Context

The customer was using Salesforce Service Cloud to manage their support operations and their engineering team was using Jira. But due to lack of collaboration, there was no transparency and also, their engineering team had to frequently hop between Salesforce and Jira, which was time-consuming. So, the client wanted to integrate Salesforce and Jira.

The Objective

The customer was happy with what Sinergify had to offer but they also needed a few additional use cases based on their business processes and requirements. They wanted those use cases to be customized in their Sinergify instance for the ease of operational practice. A higher level of customizability is one of the USPs of Sinergify.

The Solution

Our team of engineers set up the Sinergify instance into the customer's Salesforce Org that, by default offers the following use cases:

- Creation of Jira Issues from Salesforce
- Linking of Cases with Jira issues
- Cloning of Jira Issues
- Advanced Search
- Bidirectional and real-time syncing of data and updates, and more.

Apart from the said use cases, the customer shared their requirements of use cases that they wanted to include in their system. The use cases included ***notifying the owner of the creation of Jira issues, showing Jira comments as case comments for defined Jira status, and notifying the case owner of the comments on Jira side.***

After receiving the use case requirements, the team first performed a feasibility analysis to see if these use cases are possible or not. After a thorough analysis, we informed the customer that the use cases they asked for can be included by customizations. The customer shared his agreement to go ahead with the customizations.

Our team did some customizations to meet the requirements and developed certain workflows that allowed:

- Adding the Salesforce case owners as 'watchers' on related Jira issues to get regular updates.
- Showing case status as Jira comments under case comments when action is pending from the case owner (support) i.e. if case status is 'Waiting from Support' and 'Resolved'.
- Notifying case owners and the account team if any Jira action is pending from the support team, like if engineers need some steps to be reproduced from the customer end to solve the issues.

After the customizations were completed, we did a rigorous quality analysis, and once convinced, we handed over the tailored Sinergify instance to the customer.

The Outcome

After the successful set up of the tailored Sinergify instance into the customer's Salesforce Org, their support teams were able to perform their tasks without the need of switching instances (Salesforce and Jira).

Also, the use cases that the client asked for were successfully included in their Sinergify instance. All in all, Sinergify helped the client reduce the friction between the service and engineering teams. The end-results that the customer witnessed included:

- Improved transparency into the tasks of both engineering and support teams
- Lowered employee burnout and mitigated risk of click fatigue
- Escalated process of resolution go customer cases
- Better performance analysis based on Sinergify reports
- Improved support productivity and service experience

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