



## CASE STUDY

# Delineating the Secret of Successful Integration of a Custom Salesforce Object and Jira

## HIGHLIGHTS



Improved Engineering Team's Collaboration



50% Reduced Effort in Free Trial Request Management



Up to 70% reduction in Employee Burnout



2-Fold Increase in Opportunity Conversion

### The Customer

A technology company based out of New York City, USA. The customer is a decade and a half old company and is a leading provider of cloud-based network of applications including a search experience cloud platform. Valued at over \$220 million, the company enjoys a wide range of global clients across different horizons and industries. The company also has several prestigious recognitions from organizations like Fortune and Deloitte.

### The Context

The company was using Salesforce CRM platform to manage its customer relationship management operations. There were a number of standard and custom Salesforce objects configured within their Salesforce instance; one of those custom objects was 'Free Trial'. Their engineering teams were divided in accordance with their tasks of managing free trial requests and were using Salesforce and Jira. So, the customer was facing a great degree of problems due to lack of collaboration within the engineering team and effective management of free trial requests was being affected.

### The Objective

The customer was exploring the possibilities to end the issues with the engineering team's collaboration and wanted to simplify the free trial request handling. So they wanted to integrate Salesforce and Jira. Grazitti was already their Salesforce consulting partner and was handling their automation project. They discussed their query about Salesforce and Jira integration with our experts and they suggested them to use **Sinergify - a Salesforce and Jira Connector**.

## The Solution

Sinergify is the only connector in the market that allows the integration of all standard and custom Salesforce objects with Jira (both on-premises and cloud). So, our product experts took up the task to set up the integration of the **'Free Trial'** object with **Jira**. Let's first take a look at the free trial request management. The data of free trial requests are logged into their Salesforce instance. Then the first team analyzes the credentials of the account and contacts. They verify the data against the set of criteria needed for providing a free trial. If the criteria are met, the Salesforce team then creates a Jira ticket for the same account/contact under the **Free Trial** record. Then the Jira team, including Sales reps, further manages the free trial process like sharing the app/software credentials and following up to convert those opportunity accounts into customers.

So to enable the integration, our Salesforce experts installed and configured Sinergify in their Salesforce Org. Once the integration was set up in the backend, our experts configured the admin console of Sinergify based on the customer's requirements.

The customer also wanted certain automation of criteria mapping to take some load off their engineering team members. The automation included a few of the set criteria that were analyzed against the leads' data and checked if true, else left pending if the required values were missing. This largely helped their Salesforce using team to analyze incoming free trial requests based on fewer criteria rules than before.

Following the integration and automation of tasks, their engineering team members were able to:

- Analyze the incoming free trial requests against their criteria
- Create Jira tickets right from Salesforce without the need of switching between Salesforce and Jira
- Auto-assign team members to the Jira tickets
- Track the status of Jira tickets right from Salesforce
- Auto-update Salesforce status based on the changes on the Jira side

**Note:** Once a Jira ticket is created and assigned to a team member, the assigned team members (Jira users) would verify the validity of the account's data. If passed, then s/he would manage the next part of the free trial process including providing the trial Org credentials and following up on that. Following the integration and automation setup, their Org was put under stringent QA. Upon receiving a good-to-go from the QA team, the Org was handed over to the customer.

## The Outcome

Following the integration, the management of free trial requests became much more convenient for their engineering team. The siloed interactions and difficulty in information mapping was no longer a concern.

Now their sales team doesn't have to worry about maintaining Jira records. Similarly, their engineering team had the correct info in one place, removing all the bottlenecks for the teams.

Their engineering team saw a tremendous 50% reduction in their time and effort that was due to switching between instances and lack of automation. With reduced effort, employee burnout witnessed a 70% dip.

With an expedited and timely free trial assignment, it impacted their leads experience. Hence, the customer also witnessed a two-fold increase in lead conversion.

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