



CASE STUDY

Enabling Effective Cross-Functional Collaboration for a Leading IT Company

HIGHLIGHTS



Minimized Manual Effort



Streamlined Communication



Quicker Case Resolution

The Customer

The customer, a leading information technology provider, enables businesses to back-up, manage, and extract insights from data across systems and in the cloud. They build software that helps IT professionals consolidate and simplify data management, as well as analytics. This enables businesses to resolve issues such as mass data fragmentation.

The Context

While the company's customer support team uses Salesforce for case management, their engineering team manages projects on Jira. There are times when a customer wants to return a product for a refund, replacement, or repair. For this they require a Return Merchandise Authorization (RMA) from the company.

In this case, a support/field service representative raises the customer's RMA request with the engineering team, which is responsible for product replacement/repair. However, the engineering team needs to be assigned a Jira ticket with action items that correspond to the RMA request. They also need to give visibility to the support team with regard to the status of these action items.

The OBJECTIVE

The customer's objective was threefold. First, they wanted to automate data flow in Salesforce and Jira in order to reduce manual effort. Second, they wanted to prevent an increase in overhead costs and minimize human error by eliminating the need for the support and engineering teams to wait for status updates from either side. Third, they wanted to remove barriers to effective communication between their field service and manufacturing teams.

The Solution

In order to help the company achieve these objectives, Team Grazitti integrated their Salesforce and Jira with Sinergify, and enabled:

- Field service representatives to **create a 'work order line item'** and share RMA request details with the manufacturing team by **creating a Jira issue from Salesforce**
- The engineering team to dispatch the product/component in accordance with Jira issue details
- The engineering team to **send an email notification to the customer** and field service representative about product/component dispatch status by updating the Jira issue
- The field service representative to **update the status of the 'work order line item'** as fixed or closed, following which the case can be closed, as well



The Outcome

With the successful implementation of Sinergify, the customer has been able to eliminate the need for manually tracking spreadsheets about product component versioning. They have been able to establish seamless communication between their field service and manufacturing teams. They are now able to easily track replaced products and components with reporting for Salesforce records associated with Jira issues.

* Salesforce, Service Cloud, Sales Cloud, and others are trademarks of salesforce.com, Inc. and are used here with permission.