From Fragmented Records to Real-Time Reporting: Streamlining Salesforce for Turbine Manufacturing

The Customer

The customer is a global leader in the steam turbine manufacturing industry, operating across multiple countries and serving a wide range of industries. Despite its prominence, the company struggled with fragmented and duplicate customer account data in its Salesforce system, impacting their ability to manage customer relationships, track assets, and generate accurate reports.

The Challenge

The customer faced significant challenges in managing their Salesforce data, primarily due to duplicate accounts and inconsistent record types during account creation. Additionally, the lack of a clear account hierarchy made it difficult to manage relationships and track assets effectively. These issues hindered the customer's ability to generate accurate reports, impacting overall business decision-making.

The Solution

CriticalRiver addressed these challenges by implementing a comprehensive Salesforce data management and optimization solution. The process included a thorough data analysis and cleanup to remove duplicate accounts, establishing a parent-child hierarchy to unify account structures, and simplifying record types to enhance consistency. Furthermore, account-asset relationships were created to improve visibility, and logic was added to prevent future data duplication.

The Results

The customer's Salesforce environment was transformed by CriticalRiver's optimization efforts. With duplicate records removed, a clear account hierarchy established, and account-asset relationships created, the customer now enjoys streamlined operations. Data standardization has allowed for more accurate reporting at both regional and enterprise levels, and the prevention of future duplication ensures long-term data integrity. This transformation has positioned the customer to make better business decisions, manage assets more effectively, and enhance overall operational efficiency.

Impact Delivered

- 40% reduction in duplicate accounts
- 30% improvement in reporting accuracy
- 25% increase in operational efficiency

Solution Components

- Salesforce Sales Cloud
- Salesforce Data Loader
- Salesforce CPQ
- Salesforce Custom Objects
- Duplicate Prevention Logic