

Unifying Business Processes for a Leading Pharmaceutical Company



The Customer

A prominent pharmaceutical company, recently involved in a major merger, required the unification of business processes across multiple regions. Their goal was to consolidate operations under a single Salesforce instance, incorporating both Sales Cloud and FinancialForce licenses.

Impact Delivered

- 40% increase in user productivity
- 30% reduction in operational costs
- 100% data integrity
- 25% boost in efficiency

The Challenge

The pharmaceutical company faced several critical challenges following its merger:

- Multiple Salesforce Orgs: Operations were split between US and India orgs, causing data silos and inefficiencies.
- Region-Specific Processes: Different service models across regions made standardization difficult.
- Manual Financial Workflows: Lack of automation in financial operations slowed down reporting and accuracy.
- Outdated Interface: The Classic Salesforce interface hampered user experience and adoption.
- Complex Data Migration Needs: Over 50,000 records had to be migrated securely without losing historical data.

Solution Components

Salesforce Sales Cloud, FinancialForce, Salesforce Lightning Experience

The Solution

CriticalRiver implemented a tailored Salesforce solution to address the client's challenges:

- Org Consolidation: Merged US and India Salesforce orgs into one unified platform.
- FinancialForce Integration: Deployed FinancialForce for seamless financial operations in the US.
- Custom Regional Workflows: Built workflows for India-specific FTE and FFS service models.
- Lightning Upgrade: Transitioned to Salesforce Lightning for improved usability and speed.
- Lead Lifecycle Automation: Implemented end-to-end lead management for better visibility.
- Data Migration: Migrated 50,000+ records with 100% integrity and zero disruption.

The Results

With CriticalRiver's tailored Salesforce and FinancialForce integration, the pharmaceutical company successfully unified its regional operations and financial workflows. The Lightning-enabled interface improved user experience, while automated lead management and accurate data migration preserved critical insights. The result: reduced complexity, improved efficiency, and a scalable platform for future innovation and growth.