

# Making Field Teams More Efficient

## Centralizing Agent's Day-to-Day in Sales Cloud



CloudKettle

### The Challenge

The client has a door-to-door team that visits homes nation-wide. Each sales agent has an iPad and sells services to households using Salesforce.

These door-to-door team members are 3rd party contractors and not directly employed by the client, making standard tracking within the usual corporate system a challenge.

Disparate systems and lack of visibility created inefficiencies and disrupted workflows of managers and executives. A better system was required to allow client's subcontractors to centralize reporting and track items like Paid Time Off and equipment returns.

### Focused Solutions

- 1 CUSTOM SALESFORCE OBJECT**  
This allowed contractors to book Paid Time Off directly in Sales Cloud and gave added visibility to managers and executives.
- 2 AUTOMATE REQUESTS**  
A custom solution built using APEX code automated Time Off booking requests.
- 3 INCORPORATE PROCESS IN SALES CLOUD**  
Custom forms and automation brought the agent coaching process into Sales Cloud.

### Client Profile

#### INDUSTRY

Telecommunications

#### EMPLOYEES

40,000

#### SOLUTIONS

Sales Cloud/Lightning Sales Cloud

#### AT A GLANCE

The client is a national telecommunications company with operations and revenue of over \$20 billion.

### Key Metrics

The new Object and functionality translated into improved efficiency for the client. Thousands of Paid Time Off records were created, replacing a pen-and-paper process, with managers now able to track and report with increased accuracy. These new capabilities were so successful, they were ultimately rolled out to multiple teams beyond the original test group.



**Thousands of**  
new records created,  
improving efficiency



Functionality rolled out  
nation-wide to  
**3 teams**