eBook

Discover How Jade Global is Helping Customers Drive Business Value & Transform with Salesforce

salesforce

SUMMIT PARTNER

Contents

Jade Global
Salesforce Services

Jade Global is a trusted Salesforce Crest Partner with a dedicated Cloud computing and Force.com team. We have high process maturity in application development, and significant experience in mission-critical, enterprise deployment environments. Leverage our industry and domain knowledge across Sales, Marketing, Integration, Field Service, Operations, Finance, Manufacturing.

Salesforce Expertise that Assures Business Outcomes

Whether you're looking to increase demand, improve overall pipeline, increase selling velocity or streamline quote generation, Jade Global assures predictable business outcomes. Our team includes Salesforce implementation and optimization experts, architects, developers, data analysts and process integration specialists, who deliver results. We have a proven track record in complex CRM implementation, integration and optimization services across the Salesforce® CRM, Sales Cloud®, Service Cloud®, Community Cloud, Marketing Clouds and AppExchange® solutions. Our additional partnerships with Oracle, Microsoft and Boomi give us rich integration capabilities with leading Oracle EBS and ERP applications.

250x Salesforce Certifications

8	4	100%	150+	900+
Offices Worldwide	Global Delivery Centers	Referenceable Customers	Certified Salesforce Experts	IT Professionals Worldwide
200+	1000+	95%+	97%+	100%
Salesforce Projects Completed	Technology projects Completed	Customer Retention	CSAT Rated Salesforce Crest Partner	Referenceable Customers

Sales Cloud

Jade Global will seamlessly implement, revamp and assure adoption of your Salesforce Sales Cloud. Our Salesforce certified experts understand CRM best practices and complex integration within Marketing Cloud and ERP.

Service Cloud

Jade Global provides Service Cloud solutions to architects, developers, analysts and administrators. We have worked with high-tech leaders to improve the customer experience and success with a Salesforce Service Cloud implementation.

Marketing Cloud

Jade Global works with you to improve each stage of your marketing funnel with Salesforce Marketing Cloud. Our Advisory team facilitates business process reviews, understands acute pain points, and helps you build consensus across the organization. We successfully combine marketing automation and inbound tools to facilitate our customers' discovery and research journeys. The result allows you to easily generate leads and revenue attribution.

Pardot B2B Marketing

Leveraging Pardot and Jade Global's expertise is a guaranteed way to increase pipeline, sales velocity, and conversion. We help your business automate and grow with powerful workflows, lead scoring, AI enablement, integrated drip campaigns and more. Our Pardot experts provide high-tech solutions tailored to your marketing goals.

Lightning Migration

Jade Global's methodology combined with the Lightning Experience Readiness Tool provides an in-depth assessment deliverable. Areas like Knowledge, Sites.com, VisualForce, Advanced Entitlements, Solutions and Custom Buttons will require attention, as Lightning has increased the coupling with Service and Communities.

Salesforce CPQ

Jade Global has enabled leading high-tech organizations to scale their business operations and achieve sales excellence. Our CPQ experts are available to help your organization optimally create and price deals, share consistent quotes, accelerate renewals, and enhance customer relationships.

Salesforce Consulting and Advisory Services

Jade helps your organization develop a winning CRM strategy, address challenges and identify value drivers for increasing revenue and decreasing costs (both transactional and IT). We deliver best practice solutions through in-depth analysis, assessments, solution design, development, and readiness cycles. Our Salesforce consultants guarantee outcomes on cloud readiness, M&A consolidation, health checks, performance optimizations, migrations and more.

Salesforce CPQ Transformation

Enable an integrated experience for your Sales, Finance and Service teams with modern CPQ. Experience personalized interactions, timely sales velocity, and business data continuity across the enterprise.

Salesforce Instance Optimization Services

Jade Global has successfully reset CRM health, transaction performance, and enabled the next wave of digital growth for world-class organizations.
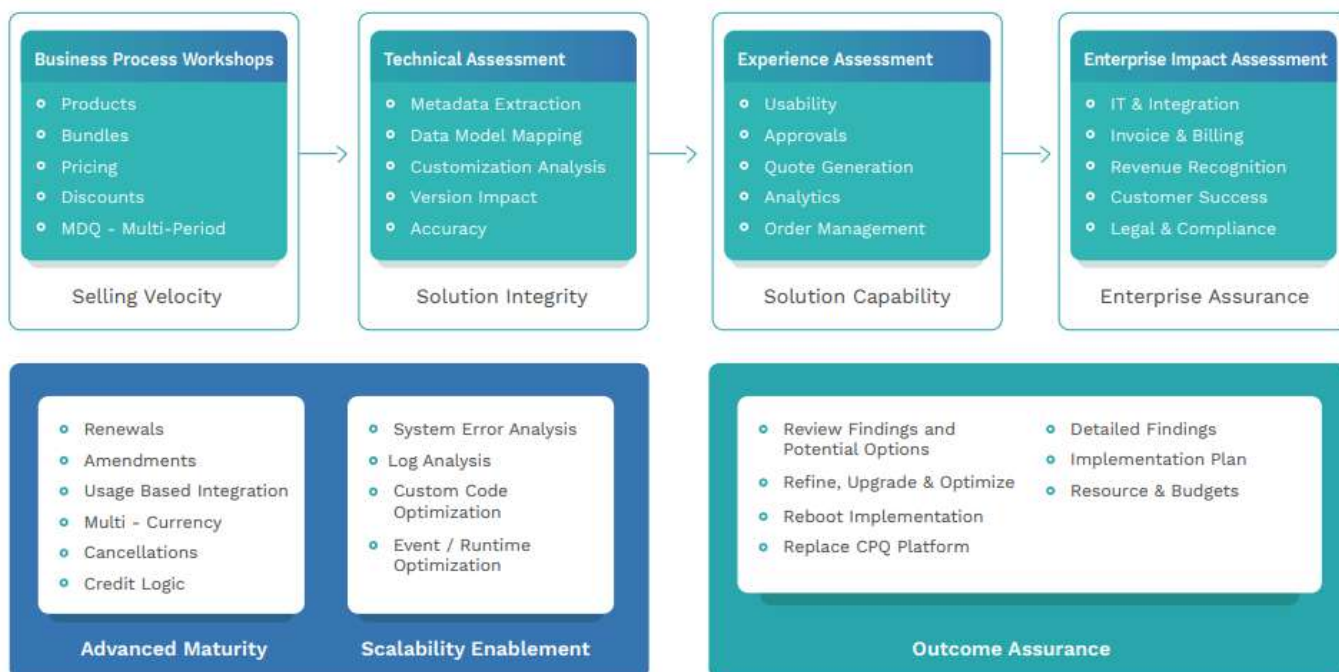
Salesforce.com M&A Consolidation

Allow our experts to translate your M&A plans into a phased implementation IT roadmap to streamline processes, reduce complexities, and manage TCO.

Salesforce to Salesforce Migration

We help you conduct successful Salesforce data migrations from your current Salesforce org. to a new instance.

Jade Global CPQ Transformation Advisory Model

Business Process Workshops
- Products
- Bundles
- Pricing
- Discounts
- MDQ - Multi-Period

Selling Velocity

Technical Assessment
- Metadata Extraction
- Data Model Mapping
- Customization Analysis
- Version Impact
- Accuracy

Solution Integrity

Experience Assessment
- Usability
- Approvals
- Quote Generation
- Analytics
- Order Management

Solution Capability

Enterprise Impact Assessment
- IT & Integration
- Invoice & Billing
- Revenue Recognition
- Customer Success
- Legal & Compliance

Enterprise Assurance

- Renewals
- Amendments
- Usage Based Integration
- Multi - Currency
- Cancellations
- Credit Logic

- System Error Analysis
- Log Analysis
- Custom Code Optimization
- Event / Runtime Optimization

Advanced Maturity   *Scalability Enablement*

- Review Findings and Potential Options
- Refine, Upgrade & Optimize
- Reboot Implementation
- Replace CPQ Platform

- Detailed Findings
- Implementation Plan
- Resource & Budgets

Outcome Assurance

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Salesforce CPQ + Billing

SELL MORE

Simplify Product Selection and Configuration

Provide Accurate Pricing with Available Discounts

Quickly Generate Quotes and Proposals

Improve Customer Experiences with Sales and Finance Alignment
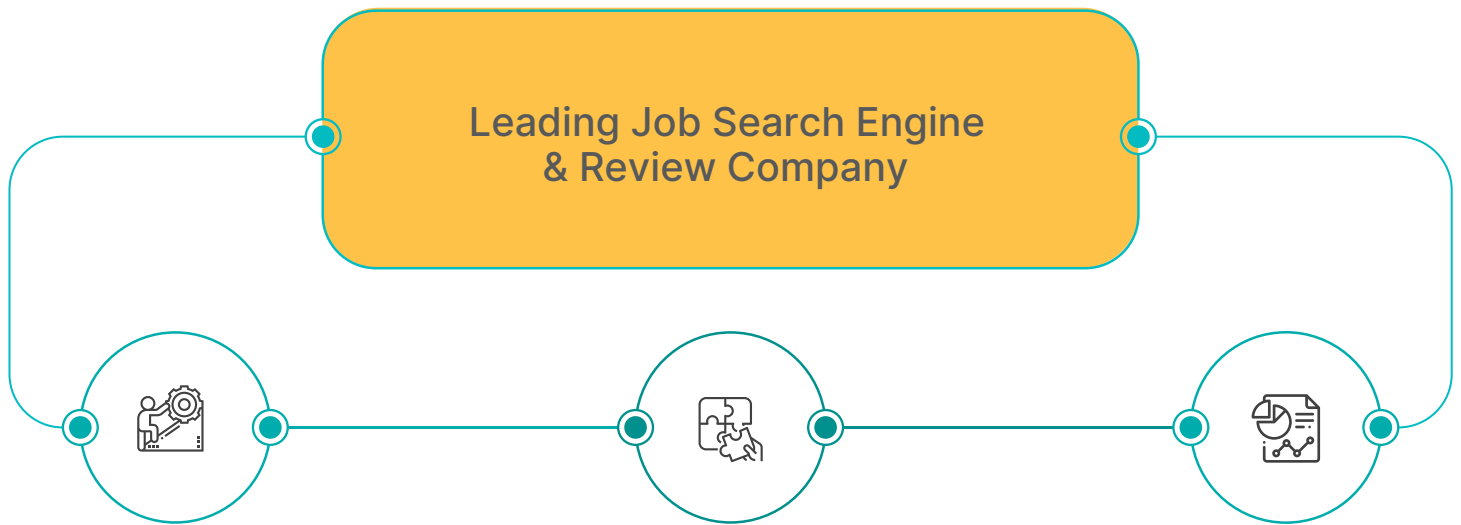
SELL FASTER

As companies and their product/service lists grow, it becomes increasingly difficult to manage product pricing, identify great upsell opportunities, and keep track of deals being offered by your competition. On top of this, sales reps excel with up-to-date pricing information on products, improving quoting velocity and more won deals. Configuring a quote can be a time consuming task, especially when critical data is not easily accessible in real time.

Adding Salesforce CPQ + Billing provides an immediate measurable ROI by enabling your sales team to optimally configure complex offerings, provide accurate pricing with available discounts and automated approval flows. Allowing your team to quote quickly and correctly every time so that they can sell more and sell faster. Finance and Revenue leaders benefit with integrated billing and quicker invoice to cash cycles.

Benefits by Leveraging Jade Global as your CPQ Implementation Partner

01 — Deliver Better Customer Experience
- Reduced effort for quotes
- Improved quote accuracy
- Mobile-friendly
- Addresses complex Bundles
- Integrated Approvals and Discounting

02 — Simplify Sales Processes
- Systemize tribal knowledge
- Richer business intelligence
- Enterprise grade deal history
- Consolidate legacy tools
- Reduce clicks on every deal

03 — Improve Sales Performance
- Provide Pricing Optimization
- Enable Guided Selling
- Automate Order Management
- Mobile-friendly
- Einstein AI Inisights

04 — Drive Growth
- Faster product introductions
- Accelerated sales rep training
- Leverage more sales channels
- Cross-Sell, Up-sell Recommendations
- Support unique territory needs

Customer Case Study

Leading Job Search Engine & Review Company

Customer Challenges

- OOTB functionality did not meet certain business requirements

- Business changed requirements frequently causing rework

- Business testing was not completed as quickly as items were being developed

- Scoping, timeline and effort estimations were not accurate

- Tip toed around downstream systems

- Knowledge transfer to Sales Reps was demanding and large amount of work for Sales Ops

Solution

- Rapid CPQ implementation

- Simple contract management process with customized document templates

- Business testing was not completed as quickly as items were being developed

- Multitude of change order scenarios with an automated streamlined process

- Renewals and Amendments Management Process

- Advanced Approvals that support a diverse spectrum of business needs

Business Results

- Decreased booking errors and increase in productivity

- Faster, Cost effective and less maintenance platform

- Scalability and Customizable Architecture to manage future needs or Technology upgrade

- Ability to create quotes in Multi Currency with minimum changes to existing quotes

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Jade's Customer Focus

Our comprehensive offerings help clients across industries drive results and gain competitive advantage. When you chose Jade, you are choosing a personalized delivery experience and a rapid return on your investment. Our Salesforce CPQ customers quickly derive benefits for their sales teams and customers.
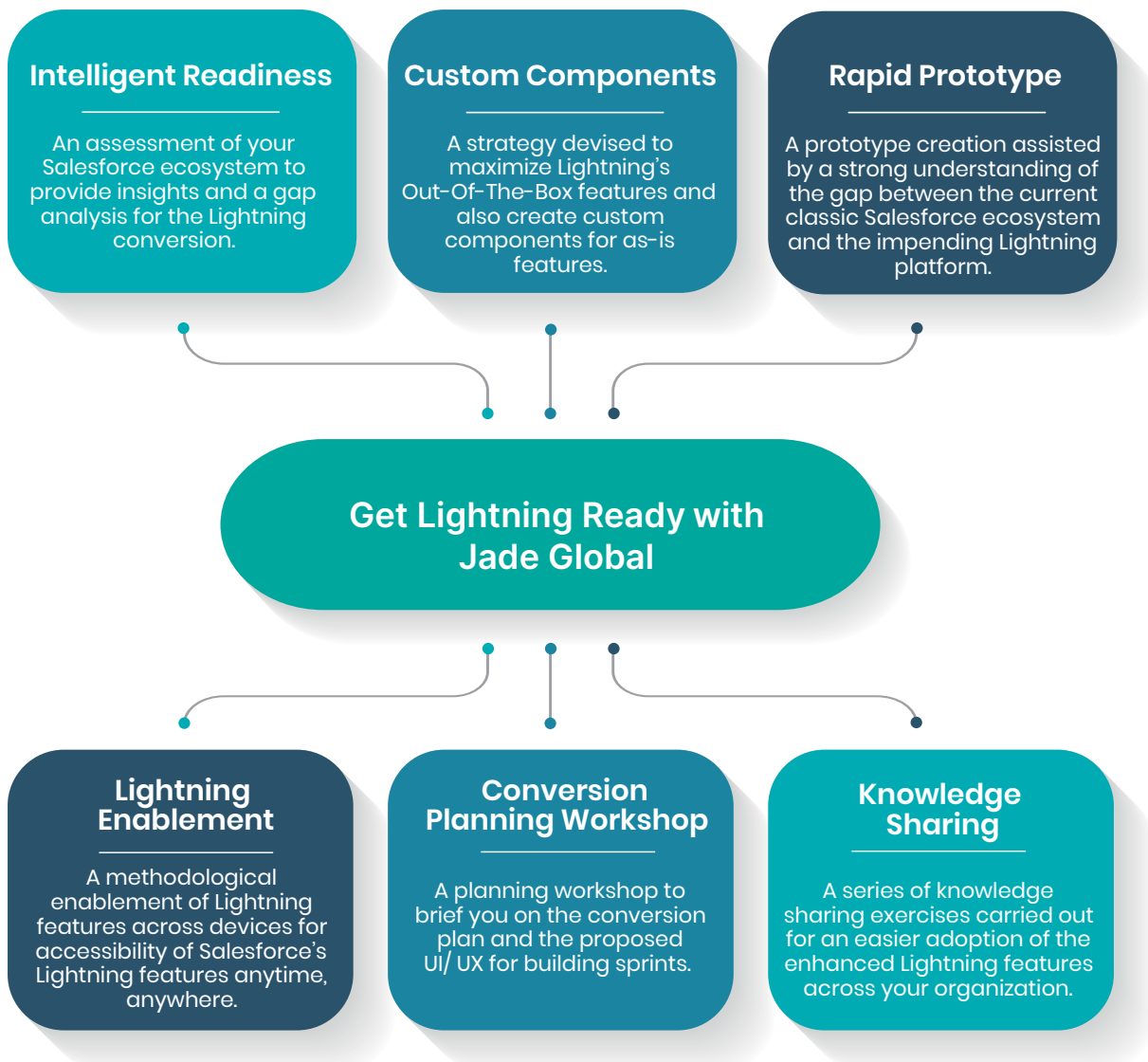
Salesforce Lightning

Salesforce Lightning is a next generation platform that provides its users with a simple and refreshing user interface. The Lightning platform provides cross-cloud experiences and unifies Marketing, Communities and other capabilities with Sales Clouds and Service Clou&. It introduces a new UI that maximizes productivity with strong analytics and intuitive workflow.

The Lightning platform allows you to easily manage your sales pipeline, and extract insightful analytics to grow your business faster. With the Salesforce Lightning platform, new business applications can easily be created and deployed. Salesforce Lightning also provides integral features like Lightning Voice, Lightning Builder, Lightning Snap-Ins and the most modern, event driven experience.

If you are thinking about moving to the new Salesforce Lightning platform, Jade Global will assess your readiness, determine if customizations will migrate successfully and facilitate a quick transition. Jade Global follows a bespoke methodology to implement Lightning.

Intelligent Readiness

An assessment of your Salesforce ecosystem to provide insights and a gap analysis for the Lightning conversion.

Custom Components

A strategy devised to maximize Lightning's Out-Of-The-Box features and also create custom components for as-is features.

Rapid Prototype

A prototype creation assisted by a strong understanding of the gap between the current classic Salesforce ecosystem and the impending Lightning platform.

Get Lightning Ready with Jade Global

Lightning Enablement

A methodological enablement of Lightning features across devices for accessibility of Salesforce's Lightning features anytime, anywhere.

Conversion Planning Workshop

A planning workshop to brief you on the conversion plan and the proposed UI/ UX for building sprints.

Knowledge Sharing

A series of knowledge sharing exercises carried out for an easier adoption of the enhanced Lightning features across your organization.
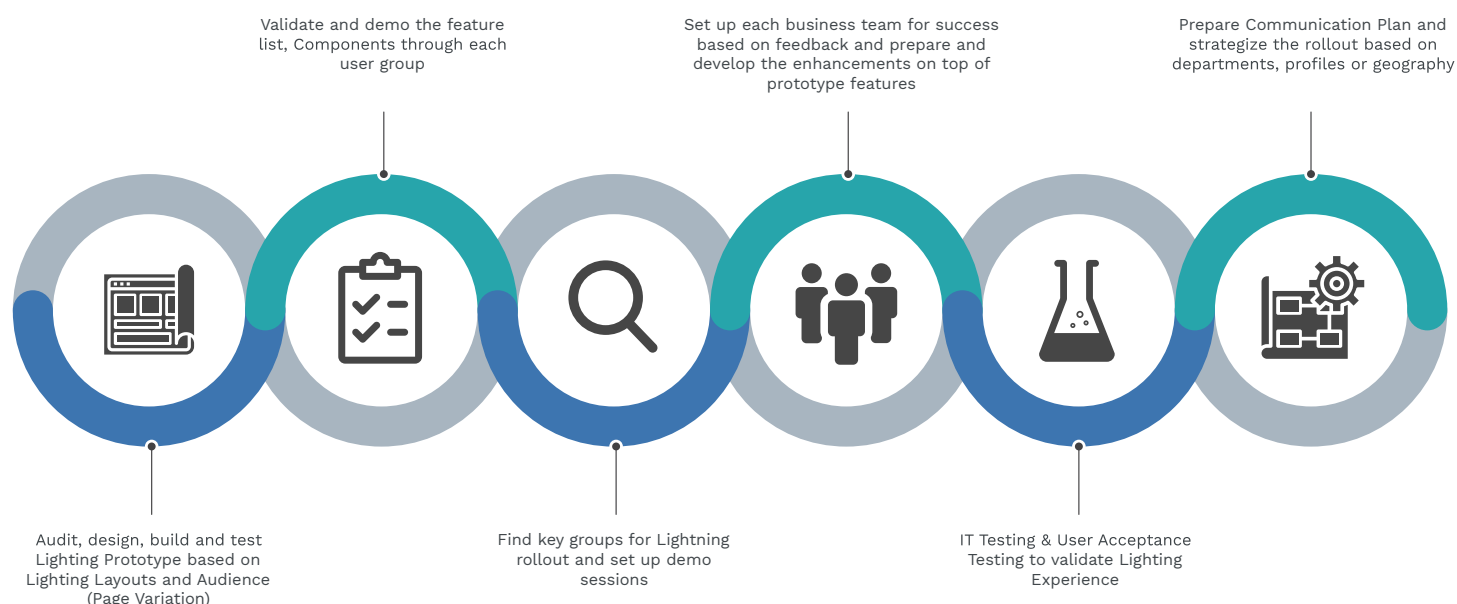
Apply Jade Global Best Practices to your Lightning Conversion Success Plan

Jade Global's expertise in Lightning conversion delivers a smooth transition from classic Salesforce to modern CRM. Our experts perform due diligence to legacy dependencies in your current Salesforce implementation and formulate the best migration methodology.

Jade Global will:

- Provide recommendations, options, and when necessary, new components that fully convert classic Salesforce to Lightning. We align your business processes and user experience goals

- Partner with business and augment IT with specialized skillsets, enabling velocity and predictability while reducing efforts of internal IT teams

- Share lessons learned from successful migrations spanning 50 - 2000 users, from a variety of industries

- Assess any instance health issues, address perfromance degration challenges, and facilitate change management

Validate and demo the feature list, Components through each user group

Set up each business team for success based on feedback and prepare and develop the enhancements on top of prototype features

Prepare Communication Plan and strategize the rollout based on departments, profiles or geography

Audit, design, build and test Lighting Prototype based on Lighting Layouts and Audience (Page Variation)

Find key groups for Lightning rollout and set up demo sessions

IT Testing & User Acceptance Testing to validate Lighting Experience

Salesforce Communities

Increase Engagement for Groups with a Common Purpose and Similar Interests

Customer Communities

Deliver a personalized experience for customers and employees. Customer Communities helps organizations increase engagement, lower operational costs and drive shared success.

Employee Communities increase engagement, foster organization-wide collaboration and improve instant access to the best information.

Partner Communities

Enable internal sales organizations and partners to collaborate in their own online social community to increase sales coverage, align go-to-market best practices, grow pipeline and scale.

Jade Global works with organizations to increase product and solution visibility, make collaboration contextual, and provide real-time access to business data. We transform sell-through and sell-with experiences by personalization and engagement and help you capture new market share.

Key Benefits for Customers & Employees

- Engage customers and employees with personalized experiences, product and service offers and self-service content

- Provide real-time, responsive case and incident management, 360 views to subscriptions and the flexibility of modern omnichannel capabilities

- Transform employee engagement with access to information, training and learning experiences and gamification experiences

Key Benefits for Partners & Channels

- Promote Channel and Distributor collaborative selling, increase productivity and improve support experience

- Optimize deal registration, on-boarding, e-signature quoting and approvals with an integrated experience

- Enable business teams, while reducing reliance on customization and reduced IT effort

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Discovery of Customer Assets that Comprise the Current Support Process

- Functional use cases supported in existing solution
- Identification of legacy data and key transaction data for migration

Discovery of Customer Needs and Prioritization for the Desired State of their Community

- Key business objectives
- Identify brand objectives
- Outline customer experience model
- Internal customer success structure
- Business processes mapping
- UI Branding –custom UI requirements from customers

Proposed Architecture and User Facing Footprint

- Propose new architecture diagram
- Review user interaction experience
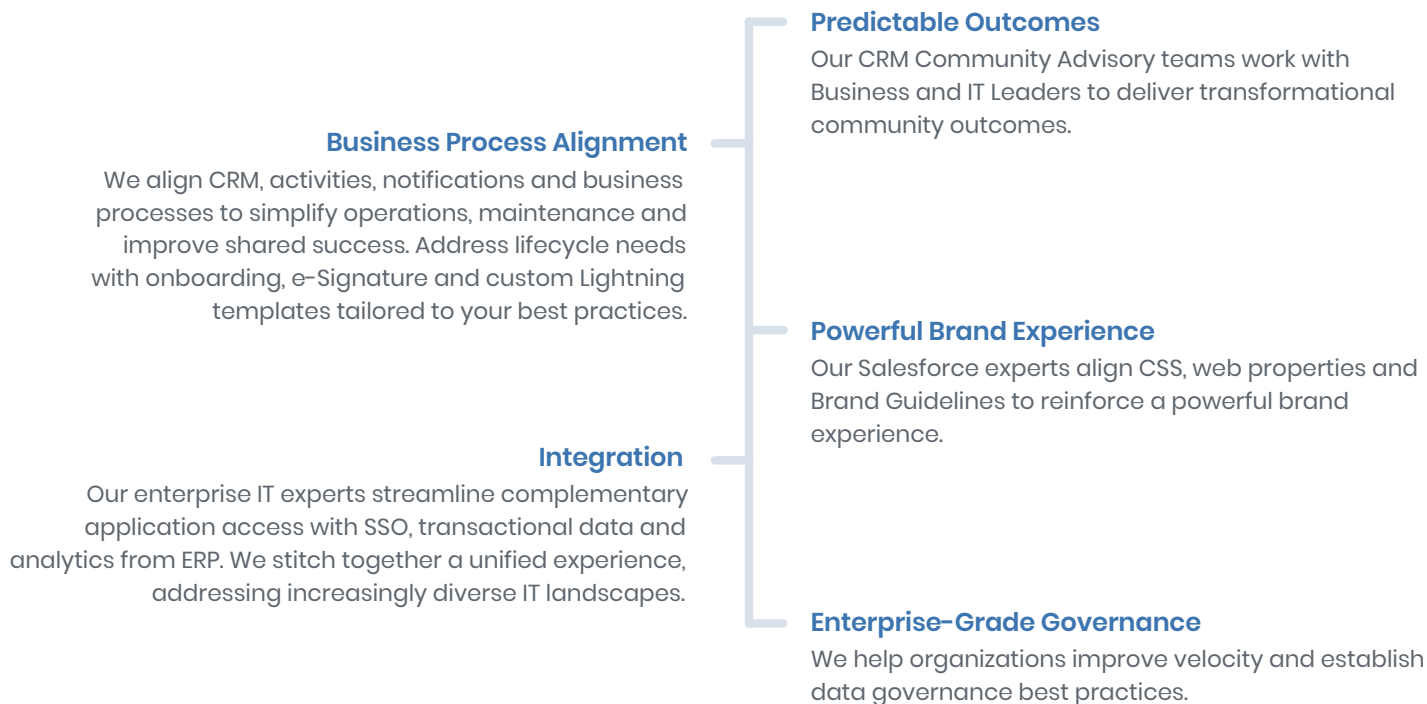- Validate click design

Implementation Strategy

- User Stories
- Sprint Planning
- Sprints
- Business Validations
- Demos
- Agile App

Implementation Model

- Initial Configuration
- Initial Communities administration
- Licensing verification
- Automation in process in terms of alerts/notifications to customers/ partners on some action
- Custom Development
- Integration

Testing Model

- Functional test cases
- UI Testing
- Negative and black-box testing
- End to End testing

Business Process Alignment

We align CRM, activities, notifications and business processes to simplify operations, maintenance and improve shared success. Address lifecycle needs with onboarding, e-Signature and custom Lightning templates tailored to your best practices.

Predictable Outcomes

Our CRM Community Advisory teams work with Business and IT Leaders to deliver transformational community outcomes.

Integration

Our enterprise IT experts streamline complementary application access with SSO, transactional data and analytics from ERP. We stitch together a unified experience, addressing increasingly diverse IT landscapes.

Powerful Brand Experience

Our Salesforce experts align CSS, web properties and Brand Guidelines to reinforce a powerful brand experience.

Enterprise-Grade Governance

We help organizations improve velocity and establish data governance best practices.

Recommended Best Practices and Lessons Learned

Manage Scope

- Start small; prioritize based on value
- Iterate; provide meaningful value in each phase

Don't Compromise on UI and Onboarding

- Adoption is key, especially if partners have a choice whether to use the tool
- Bring every new customer and partner via your Community, reinforcing powerful self-service and digital experiences

Ensure Alignment of IT and the Business

- Vested executive sponsors assure adoption
- Business and IT champions lead workshops

Empower and Work as a Cross Functional Team

- Follow SCRUM best practices and appoint Product Owners for each Epic

Align to Team Members to Strengths

- Super-users for training
- Channel marketing for branding
- Sponsors for Change Management

Communicate and Manage Expectations of Customers and Partners

- Establish the transition calendar
- Leverage existing web-properties notifications at least 2 weeks before launch
- Socialize new features and processes with sales, customer success and how they benefit

Salesforce.com M&A Consolidation

Mergers & Acquisitions (M&A) are great opportunities for organizations to unify core business processes and create a common framework for scaling the organization. However, transformational change brings a large deal of uncertainty regarding new roles, sales and support best practices, and a new enterprise footprint.

Jade Global has delivered repeated shared success through organizational M&A projects by eliminating risk and tackling complexity. Jade Global elicits and recommends strategic IT roadmap options that transform business processes, reduce complexity, and optimize TCO across your enterprise IT landscape.

Our experts are adept in translating M&A plans into a phased implementation IT roadmap that meets the M&A business goals, while addressing time and budget constraints. Our accelerators simplify legacy application conversions and integrations across CRM, ERP and key business applications. With Jade's M&A Consolidation services, business teams can transition smoothly and focus on synergies, new markets, products, and customer needs.

Why Jade Global for your M&A Transactions?

1. Business Process Reengineering
2. Data Quality Dashboards
3. Proprietary Data Analysis Tools
4. Archived Legacy and Configuration Data
5. Standardized Change Management
6. Simplified Integrated CRM Architecture
7. Transaction Data Migration Best Practices
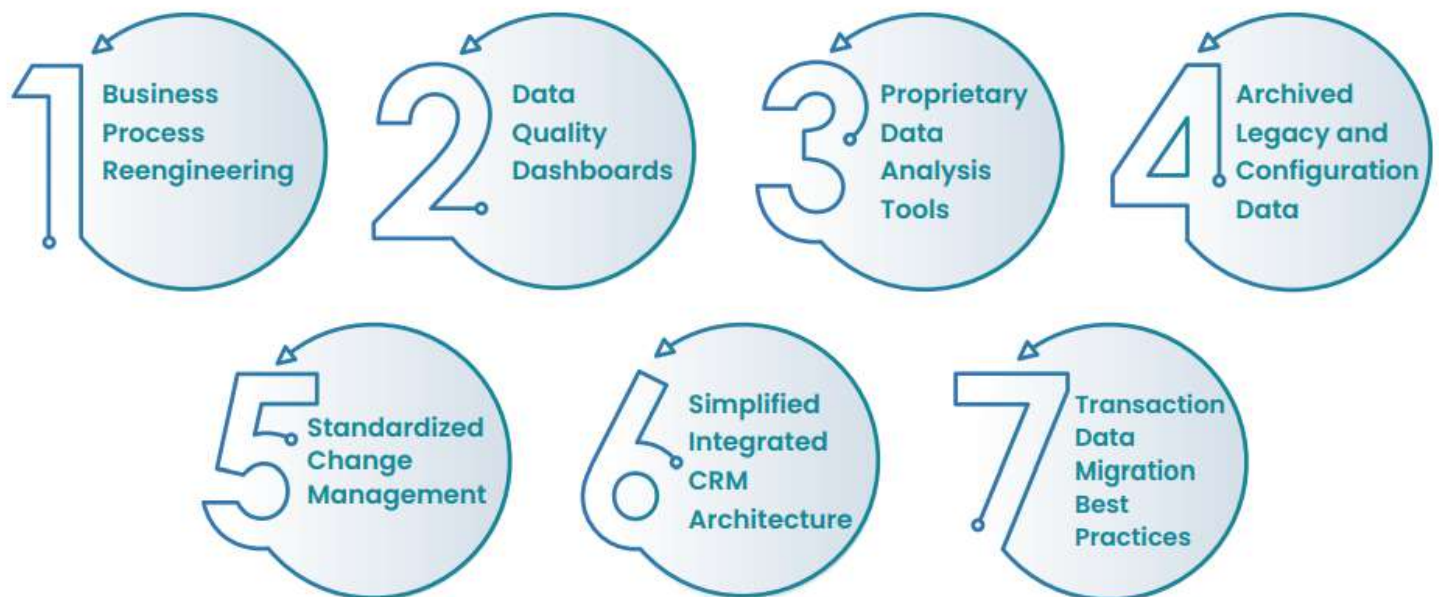
Jade Global Advantage

- Dedicated Salesforce.com Deployment & Data Management Teams
- Optimization of Third Party Software Integrations
- Data Archiving and Data Purging
- Project Management and Specialized Workshops
- Stabilization and Business Readiness support

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Boomi Practice Overview

250+	8	4	900+	1000+	99%	100%
Customers	**Offices Worldwide**	**Global Delivery Centers**	**IT Professionals Worldwide**	**Technology Projects**	**Customer Retention**	**Referenceable Customers**

Jade Global is one of Boomi's most trusted Boomi Certified Select Implementation Partner. Our core offerings include A2A, EAI, EDI, B2B, ETL, MDM and API management. With over 100+ Boomi Certified Consultants with Global Delivery Capabilities, we deliver complex, yet cost effective integration solutions for Cloud and on-premises applications to help 50+ Boomi Customers accelerate business agility and achieve rapid digital transformation. Our Applications Managed Services team provides 24×7 support to ensure strong inbound and outbound data flow and connectivity.

Jade's Boomi Comprehensive Services Offering

Advanced IT Consulting

- Assessment and Fit Gap Analysis
- EAI evaluation and Roadmap Definition
- Advanced Solution Architecture & Development
- A2A, ETL, B2B, EDI, API, MDM Implementation
- Comprehensive Project Management
- Incremental Implementation and End to End Testing
- Knowledge Transfer and IJser Training

Support & Maintenance

- Production Support
- 24*7 Support
- Upgrades & Migrations
- Performance Tuning
- SLA based services
- Troubleshooting

Boomi Jumpstart Services – iPaaS & Hybrid

Jade helps organizations integrate their platforms through a pre-built package which includes gathering the requirement building a business process model and architecture, developing the integration process, testing and user training. Our middleware implementation process includes 6 steps:

- Environment Setup
- Prioritization of Integration Processes
- Architectural Design and validation
- Top Integration Processes Development
- Best Practices review
- Setup for Business Activity Monitoring
- User Training

Migration

Re-engineering /Migration from legacy to Unified Boomi iPaaS Platform

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Jade's Boomi Comprehensive Services Offering

Boomi API Enabled Integrations

Interact with multiple systems for event-based needs or real-time updates. We connect your new applications to existing legacy systems to optimize internal business processes

Boomi MDH (Master Data Hub) Implementation

Easily manage the consistency and quality of data replicated across multiple systems/ applications with a robust MDM Solution

Boomi EDI (Electronic Data Interchange) Implementation

Seamlessly integrate your enterprise services with trading partners, streamline operations and automate EDI

Boomi Flow Implementation

Automate workflows on any device, channel or platform and create innovative new experiences for customers, partners, and employees

Jade Advantage

Our partnerships with Boomi, Oracle, Salesforce, Microsoft, ServiceNow, Jitterbit and Netsuite help us provide our clients with robust, scalable solutions. We have over 16 years of experience implementing solutions in CRM, ERP, Microsoft, Managed Services, Analytics and Information Management and Big Data. Jade Global delivers customized solutions to our clients in a wide variety of industries; financial services, high-tech, discrete manufacturing, healthcare, retail and CPG, energy, utilities, services, and more.

Jade Accelerator — Jade Pre-built Solution (Oracle Fusion Cloud Integration)

Jade Prebuilt Solution for Oracle Fusion Cloud Integration with applications across the organization

- Helps jumpstart with Boomi for complex Cloud integration
- Single Webservice Call
- Robust and Customizable Error Handling
- Cost Effective

- High availability
- Faster Implementation
- Easy scheduling — Run on your PACE!

Cost Effectiveness and Flexibility

We provide the flexibility to adapt and respond to your changing business needs. Our experts handle fluctuating workloads without letting these disruptions increase your implementation costs.

Delivery Model

- Global delivery model
- JDP — Jade Delivery Platform Best Practices
- Certifies ISO 20K and 27K and GDPR Compliance
- Lower cost of services at higher value through Global Delivery Model
- Dedicated Delivery Leads
- Jade University

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Proven Solutions and Templates

Jade Global has prebuilt, defined templates and data models from past integration solutions so we can quickly get started on your Projects

- Salesforce — NetSuite Order Management

- Oracle Fusion Cloud Inbound and Outbound Pre-built solution, data models and mapping

- Oracle HCM Cloud to NetSuite Integration

- EDI Data Model and Mapping Sheets

- RevSym and RevPro — Revenue Recognition Data Models

- and Mapping Templates

- Microsoft Team and Atlassian Confluence Integration

Global Support and Services

Our team of experts provide 24×7 support, services and quick respond to customers. Jade's Delivery Assurance program provides architecture and process review to ensure best practice adoption.

Our Goals

- Reduce Testing Time
- Reduce the conflicts or changes
- Design the Simplest Solution

- Leverage standardized integrated tools
- Create secured & robust production systems
- Improve the performance of individuals and teams

Jade Global Boomi Implementation Services

Jade Global is a Boomi Certified Select Implementation Partner. We deliver comple& yet cost-effective integration solutions for Cloud and on-premises applications to help customers accelerate business agility and achieve rapid digital transformation. Using pre-built, defined templates from past solutions, we help our clients quickly get started on integration projects with applications across the organization; Salesforce, NetSuite, Oracle Cloud (Fusion), SAP and more. Our Hybrid Integration methodology helps simplify and achieve rapid time to value by reducing data and application integrations by weeks, months and even years !

Salesforce QA & Testing Capabilties

Jade Global QA Practice Overview

Services
- Advisory
- Quality Assurance
- Quality Engineering
- Digital Assurance
- Emerging Tech QA

Solutions/ Accelerators
- Xenon Test Life Cycle Management Platform
- 300 + Manual and Automation Test Scripts
- Test Automation Accelerators & Framework

People — **Services** — **Clients** — **Solutions** — **Expertise**

Team
- 150 + Testing Professionals
- 20+ ISTQB Certified Professionals
- 25 + Salesforce Functional Testers
- Expertise Across Multiple Automation Tools

Clients
servicenow   FHLBank San Francisco
riverbed   glassdoor
OSIsoft.   Infoblox
FORMFACTOR   workday.
Save a lot

Expertise
- Enterprise Application Testing
- Domain/ Functional Expertise
- Market Leading and Open Source Tools
- Integration and API testing

Jade Global QA Practice Overview

Modules & Focus Area
- Accounts Management
- Leads and Partner Management
- Campaign Management
- Contact Management
- Proposals and Workflows
- Opportunity Management
- Reports and Dashboards

Lightning Testing
- Classic to Lightning Migration Testing
- Multilingual and Cross Browser Testing
- Visual Force Pages and Lightning Component Testing
- Responsive and Mobile Testing
- Performance Monitoring

Testing as a Service
- Hosted Xenon Test Management Platform
- Test Design and Executions
- Manual and Automated Testing Services
- Test Metrics
- QA Advisory

Type of Testing
- End-to-End Automation Testing
- Functional Testing
- Performance Testing
- Integration Testing
- Configuration Testing

Automation Tools
- HP ALM / UFT
- Tosca / Qtest
- WorkSoft
- Selenium
- Appium
- Sauce Labs
- Perfecto
- JMeter
- Steel Central
- Aternity

3rd Party Apps Integrations
- Enterprise Application Integration
- CPQ Integration
- Marketing Automation Integrations
- Integration Platforms like SOA and Boomi
- AppExchange Solutions

Jade Global SFDC Test Automation Solution

Test Management Platform

- Test Planning
- Test Case Management
- Test Case Execution
- Defect Tracking
- Reporting

Test Automation Accelerators

Prebuilt Test Cases

- 300+ Prebuilt Manual and Automation Test Cases
- CPQ E2E Flow:
  - Product Prices
  - Amendments
  - Pricebook (Catalogue)
  - Renewals, etc.

- Customer Service and Support
- Omni Channel
- Billing
- Reports and Dashboards

Automation Framework

- Hybrid Framework: Data-driven and Keyword-driven
- Supports Salesforce Classic and Salesforce Lightning
- Object Repository to store all objects on respective page objects
- Reusable Functions to generate test data
- Support for Recovery Scenario
- Minimum manual intervention
- Exception Handling
- Easy Reporting

Automation Scripts

- Automation Testing for Salesforce Classic and Lightning
- Prebuilt workflows
- Automation Testing Framework to automate testing of various products Role-based Access Control and Data-driven Execution
- Automated Testing across browsers and devices

Representative Clients - SFDC QA

High Tech, Analytics: Leading job search and review site

Challenges
- Complex workflows based on various criteria and subcategories
- Ensuring there is no break in the business process flow involving two or more integrated systems
- Managing a large number of Regression and Acceptance test runs during short release windows

Project Details/Solutions
- Created automation scripts to run on different instances of the project lifecycle to validate integration between external tools like Apttus, SABA, Appstore and SAP Ariba.

Business Benefits
- Accounts and Opportunities are created seamlessly from Lightning Lead Conversion functionality
- Test data creation which helps to use the data on various environments
- Support go-live and post go-live activities

Manufacturing High Tech: Leading computer and network security company

Challenges
- Automated testing of Salesforce Lightning
- Automation of Third-party system APIs, such as verifying order generation in ERP
- Automated Testing of Integration of Oracle Fusion and Salesforce

Project Details/Solutions
- Built automation framework with the help of Selenium WebDriver
- Automation of Regression Suite to test Regression pack in less time
- Run scheduled automation builds
- Developed reusable utilities like Excel read, write, generate random numbers, date/time

Business Benefits
- Test management, Test Reports and Bug Tracker under one application
- Business can test regression pack in a single click
- Email notifications of test reports
- Intuitive and detailed test reports

Manufacturing High Tech: Leading networking and computer software company

Challenges
- End-to-End testing solution with Test Case Management and automated execution in SSO enabled environment
- Geographically distributed development and QA teams
- Manual QA processes had long manual QA regression testing cycle of 4-5 weeks

Project Details/Solutions
- Implemented the Xenon Test Management Solution to manage all testing needs from Test Management to Defect Tracking to Reporting
- Achieved end-to-end automation with integration of QTP and Selenium using Xenon APIs

Business Benefits
- All QA artifacts in one application
- Comprehensive reporting and dashboard capability using graphical views
- Different filters to filter out defects under specific release/build

High-Tech Leader Transforms Operations with Salesforce and Jade Global Assurance Services

About the Client:

OSIsoft Software, LLC provides infrastructure software solutions. The company designs, develops, and produces pre-packaged computer software that manages and connects sensor-based data and operations. They deliver the PI System, the industry standard in enterprise infrastructure, for management of real-time data and events. With installations in 107 countries, the OSIsoft PI System is used in manufacturing, energy, utilities, life sciences, data centers, oil and gas, facilities and process industries. Founded in 1980, OSIsoft, LLC is headquartered in San Leandro, CA, with operations worldwide and is privately held.

Client - OSIsoft Software, LLC
Industry - Computer Software, Enterprise Event Monitoring

Product & Services

- Salesforce Sales Cloud@
- Salesforce Lightning Experience
- SAP ERP

- Marketo Marketing Automation
- Inside View Marketing Intelligence
- Salesforce Field Service Lightning

Business Requirements

- Sales Cloud Implementation
- Marketo to Salesforce Integration
- Salesforce to SAP Account Integration
    - Create a unique identifier for each account record
    - Create an address link from Salesforce to SAP

- Inside View
- User Training
- Systems Integration Testing
- Data Migration Verification
- IJAT

- Business Acceptance Facilitation
- Post Go-Live Support

Project Scope and Overview

OSIsoft chose to transition from Microsoft Dynamics to the Salesforce.com platform to transform business operations and enable company growth plans. In concert with the implementation partner, PwC, Jade Global served as the Assurance services partner to support business acceptance, testing and readiness. The Jade Global team, comprised of SFDC leads, analysts and developers, dutifully served as test management owners and participated in all project activities, from business requirement workshops to leading UAT. As the main point of contact with diverse business teams, Jade Global's responsibility was to assure solution integrity and develop best practices for testing business processes and extensive data migration.

Jade Global conducted ongoing demos with key business users and project managers, adding value across marketing and sales, and addressing change management. Jade owned all aspects of the QA process. Jade served as a trusted partner to both the client and the implementation partner, enabling shared success for an exceptionally large global project team.

Jade Global serves as an implementation partner for CRM, providing assurance services with additional partners. This requires rigor and expertise, and to be mindful of the soft skills of multi-vendor shared success. Across the enterprise integration experience, from Marketo and Salesforce, as well as SAP and Salesforce, Jade Global's analysts pay close attention to overall sentiment and human element. The SFDC Jade Global team reached acceptance for a bespoke Regression Test Case Library, End-to-End Scenarios, Black Box and Negative Scenarios, and executed all scenarios, while leading SIT and IJAT tracks.

Business Challenges

- Complex integration of Marketo and Salesforce, SAP and Salesforce

- Assuring stability in data migration business requirements

- Establishing and iteration of CRM QA best practices

- Assurance of timelines by bridging all teams, throughout a global change management process

The Benefits

- The entire company functioning as a single and cohesive organization (defects, or showstoppers, defer until post go-live)

- Efficient and precise communication between implementation partners, steering committees, business teams and all WW regions.

- Training and small group sessions increased user confidence

- High predictability with compliance capabilities, at time of cutover

The Solution

Jade Global executed the requirements for delivering a detailed test library through iteration and revisions, with the feedback of business champions. Some teams preferred traditional test step processes, and other teams preferred user manual documents with screenshots. OSIsoft set an expectation that business teams were to perform all testing and Jade Global adapted to user preferences to assure true business acceptance. The tools included a Salesforce-based PM'S, a variety of documents and frameworks to log issues, changes, and incorporation into the agile tool.

Business Benefits and Results

With a collection of powerful Salesforce Clouds and leading AppExchange packages, OSIsoft was able to achieve transformational CRM success and mature readiness. Business teams around the world successfully transitioned into a relevant system of engagement, and the Jade Global team assured adoption and business acceptance in delivering a transformational CRM foundation with OSIsoft.

Service Transformation Powered by Jade Global Managed Services Enables IT Securities Giant to Reduce IT Spend by 30% and Transform IT Landscape to Cloud

About the Client:

Infoblox delivers Actionable Network Intelligence to enterprise, government, and service provider customers around the world. The company provides network control, automation, and domain name system (DNS) solutions that ensure continuous secure operation of network services. Infoblox is privately held and headquartered in Santa Clara, California.

Client - Infoblox

Industry - Computer Networking

Product & Services

- Oracle EBS — Financials, Supply Chain, Manufacturing
- Oracle RightNow — Service Cloud@
- Salesforce.com — Sales Cloud, Marketing Cloud, CPQ (APTTUS)
  Database Support — Oracle, SQL Server, MariaDB
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- Integration Platforms — webMethod,s Boomi
- Legacy Web Applications — Java.net
- Intranet - SharePoint
- Business Intelligence — Tableau, Business Objects

Business Requirements

- 24X7 support requirement for global need users (US, EMEA, APAC)
- Larger focus on strategic projects and priorities by the BSA and IT teams
- Requirement to move to proactive support
- Improvement in the knowledge management to avoid dependency on specific people
- Effective management of IT Resources to avoid performance

Business Challenges

- Budget Management: Strong requirement to free up budget for strategic projects (E.g. Migration to Oracle Cloud, re-Implementing Salesforce)
- Vendor Management Overhead: Large Overhead due to managing independent contractors from 10+ vendors

Business Requirements

When Jade Global began working with Infoblox, one of the first areas of concern was budget management. Infoblox finance leaders were having challenges managing project budget and finding the time to focus on strategic projects, such as a long overdue migration to oracle Cloud and reimplementation of its salesforce instance. Moreover, Infoblox's BSA and IT teams were heavily involved in day-to-day support. A large portion of Infoblox's budget was allocated to vendor management. Infoblox was working with independent contractors from over 10 different vendors. The company wanted to cut down on vendor support to reduce vendor overhead costs. In additoin, the internal team at Infoblox was overworked from what felt like relentless efforts required to manage the organization's diverse application ecosystem.

Furthermore, Infoblox required ongoing and complex customization support of its existing applications, which were heavily dependent on a few select people. The documentation process was inefficient, leading to EBS and other support services being performed without proper documentation.

The Solution

- Managed support from Jade Global for all EBS modules (Financials/SCM), Hyperion and SFDC CRM
- Efficient DBA Support from Jade Global
- Jade Global implemented Change Management

The Benefits

- Reduced IT spend on support and development by 30% in year I (Approximately $700k in savings)
- Ongoing reduction in support by year 2 (Approximately 10% YOY)
- EBS support and stabilized application support enabled Infoblox to transform its EBS footprint and migrate to Cloud
- Integration Support — Additional budget to reach strategic initiative to move from webMethods to Boomi
- Legacy Web Applications — Retiring Web Applications moved to existing IT investments (E.g. Marketing legacy app moved to salesforce)
- Scalable and customizable architecture to handle future needs or upgrade
- Automated synchronization of master data creation
- Real-time integration and ease of use for multiple entity integrations
- Improved performance and greater payload
- Faster, Cost-effective and less maintenance platform

Business Value Delivered from Managed Support Services

Infoblox benefitted from major cost savings, better performance with a greater payload, and faster, cost-effective and lower maintenance programs. After working with Jade Global, Infoblox was able to reduce its overall IT costs for support and development by 30%. Jade Global's system of a single web service calling also reduced licensing costs. Within one year, Infoblox saved approximately $700k! BY year two, the ongoing reduction in support improved employee productivity by 10%. The new stabilized support Jade Global provided allowed Infoblox to transform its EBS footprint, ultimately migrating its systems to the Cloud.

With the new scalable and customizable architecture, Infoblox was able to achieve its technology upgrade initiatives. For example, the company moved a retiring web application to an existing IT investment. Another one of Infoblox's most accomplished technology initiatives was migrating all customer data from a legacy CRM system to salesforce. Finally, Jade Global's integration support services enabled Infoblox to reach another strategic initiative of moving from a webMethods integration server to Boomi.

Jade Global Helps Glassdoor, Inc. Increase Annual Membership Renewals by 13% with Salesforce CPQ

Client - Glassdoor, Inc.

Industry - Internet Media

About the Client:

Glassdoor operates a user-generated online jobs and career community. It helps employees, job seekers and recruiters find and share information about companies and jobs including company reviews, interview questions, salary reports, CEO approval ratings and benefits. Its information portal holds a growing database of more than 8 million companies. Glassdoor was founded in 2007 and is headquartered in Mill Valley, California.

Product & Services

- Salesforce CPQ
- Sales Cloud®
- Sales Cloud®

Business Requirements

- Implement CPQ for booking and sales processes
- Configure product bundling and individual product sales in CPQ
- Support the Glassdoor amendment flow: add-on, upsell, cancellation, product swap, and renewal scenarios
- Prevent booking errors by setting an adaptable configuration of validation and pricing rules
- Set up effective approvals for business processes
- Enable a platform with multi-currency support

Business Challenges

- Existing deal creation process was time-consuming, error prone, and lengthy
- Existing quote process was not advanced enough to meet IT and business needs
- Specific CPQ terms and pricing models were not supported out-of-the-box (OOTB)
- OOTB functionalities did not meet Glassdood's business requirements

The Solution

- Implementation of CPQ and introduction of new products
- Comprehensive contract management process with customized document templates
- Platform-specific customizations to support Glassdoor's pricing and subscription models using Salesforce Lightning
- Customized branding guidelines using Salesforce Lightning

The Benefits

- Decreased booking errors and increased productivity
- Simpler and quicker deal preparation process with point and click functionality
- Increased year-over-year membership renewals by 13%
- Improved overall efficiency by more than 15%
- More efficient and less complex flow of sales process and buyer cycles
- Faster, cost-effective, and low maintenance platform

Business Requirements

Glassdoor offers a variety of recruitment and branding solutions for business customers. Their executives wanted to reduce the frequency of scope errors in product quote calculations by automating company-wide manual calculation processes. Glassdoor's IT and business leadership were interested in using salesforce CPQ to formalize pricing, establish standardizations, and increase efficiencies in the sales process. various independent software vendors provide IT services for Glassdoor, but Glassdoor wasn't satisfied with the quality of service. Glassdoor's executives viewed CPQ as a high-impact opportunity to provide the right sales tools to power future business growth.

Glassdoor selected Jade Global as their preferred salesforce partner to deploy CPQ. Glassdoor's executives were impressed by the quality of health check-ups previously performed by Jade. Glassdoor's product offerings include various combinations of product bundles that take into consideration client subsidiaries, location, and currency. They wanted a new system capable of accurately calculating quotes based on valid combinations. Additionally, Glassdoor was looking to automate its renewal process and grow their bottom line.

Glassdoor offers various products for their wide range of customers. sales reps at Glassdoor must understand each product and price combination, especially when creating a new deal and speaking with prospective customers. When Glassdoor approached Jade Global, creating a new deal was time-consuming and error-prone. Glassdoor's sales team often selected incorrect product combinations and made needless booking and pricing mistakes. Glassdoor wanted to build a deal creation process on the CPQ platform to fix these issues. Their leadership teams prioritized CPQ as a high-impact opportunity to provide the right tools to the sales team. Glassdoor saw CPQ as a foundational platform required to unlock new business value and continue their technology leadership.

When Jade Global initiated the CPQ project, Glassdoor had specific requirements that could not be met with out-of-the box functionalities. Jade partnered with salesforce.com, Inc. professional services Automation (PSA) to engineer a solution that met Glassdoor's unique business and transaction selling needs. Jade's development team is made up of highly skilled technical experts who customize and build enhancements on CPQ. Jade Global and salesforce PSA leveraged a global CPQ subject Matter Expert (SME) to review the architecture and help deliver a winning solution. During the implementation phase, Glassdoor wanted to experiment with a new, standardized process for sales activities. However, to offer additional value to the business, the project scope, timelines, and effort estimations had to be reworked. Jade Global and Glassdoor worked in collaboration to brainstorm new ideas.

From design, to development, through completion of the project, Jade Global followed a collaborative approach. The project teams at Jade and Glassdoor established a streamlined flow of activities. Jade assigned a dedicated professional to translate business benefits of each new product functionality. weekly demos were held by Jade's technical experts, and Glassdoor provided feedback on every feature. This allowed for easier amendments and faster implementations. Jade also implemented platform-specific customizations for Glassdoor using salesforce Lightning. Jade created customizations to support the fixed-price and duration-based subscription structure of Glassdoor's product offerings. salesforce Lightning automated and simplified the approval process. AS a result, Glassdoor's sales reps could create more frequent deals and calculate quotes faster, saving them time and energy.

While deploying CPQ and Lightning, Jade ensured that all processes and features worked smoothly with Glassdoor's existing systems. Jade integrated the new platform with Glassdoor's existing Google Adwords DoubleClick Bid Manager (DBM) and DoubleClick for Publishers (DFP). This helped create efficient ad inventory and usage checks. The result was a seamless, scalable, and flexible integration that simplified business processes. once CPQ ad Lightning were successfully deployed, Jade professionals trained Glassdoor's teams on how to effectively and efficiently use the new system. Jade provided post go-live support and issue resolution.

Business Challenges

Since working with Jade Global, Glassdoor has a future-proof, highly scalable and customizable sales model. overall efficiency at Glassdoor improved by more than 15%. The buyer cycle was reduced and booking errors caused by sales reps using the previous system were eliminated. NOW, Glassdoor can streamline the flow of activities within a guided and automated system. point and click functionalities in CPQ increased the speed of the sales deal preparation process. Glassdoor's sales reps have more time to focus on providing better customer service. CPQ calculates quotes for all of Glassdoor's product bundle combinations with 100% accuracy. This eliminates the possibility of manual errors when managing accounts and contracts with multiple customizations and currencies. Glassdoor also reported a 13% increase in year-over-year renewals. Jade's salesforce projects at Glassdoor helped create a simpler, faster, cost-effective, and low-maintenance platform.

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