

CLINICAL INK: OVERCOMING SALESFORCE COMPLEXITIES WITH PANAYA

How Panaya Enables Clinical ink to Easily Understand and Optimize the architecture of a 10-year-old Salesforce org



CUSTOMER PROFILE:

Pharmaceutical Manufacturing

WEBSITE:

<https://www.clinicalink.com>

LOCATION:

Global

THE NEED:

- Understand the infrastructure of a 10 year old org
- Plan and execute Salesforce projects
- Convert Process Builders to Flows
- Make quick changes for business users
- Org cleanup

THE IMPACT:

- Improved org that meets Salesforce best practices
- Quick execution of big projects with minimum risk
- Fulfilling business requests at a fast pace
- Innovating and adopting new Salesforce technologies and features
- Improved collaboration across the team
- Significantly reduced onboarding time of new team members

ABOUT CLINICAL INK

Clinical ink is a global life sciences company that specializes in life sciences, utilizing a combination of data, technology, and patient science. With expertise in specific therapeutic areas and advanced technology such as Direct Data Capture, electronic Clinical Outcome Assessments, electronic consent, telehealth, cognitive testing, and digital biomarkers, Clinical ink leads the way in achieving precise data collection in clinical trials and helping to pave the way for the next generation of clinical studies.

THE CHALLENGE

Clinical ink has a Salesforce org that was created a decade ago, and which has been overseen by various managers throughout its existence. In addition, this org was highly customized, and as a result, it became very complex.

One of the main goals of Clinical ink's Salesforce team is to keep optimizing the org according to Salesforce best practices and take advantage of all the significant developments Salesforce offers. However, this task can be very challenging without knowing exactly how the org is built and without understanding the entire backend infrastructure.

In an effort to optimize legacy processes and streamline operations, Clinical ink is in the process of transitioning from using Process Builder to Flows, and enhancing current Flows using new features that have been added.

In planning for this change, the team must carefully identify any components in the system that will be impacted so that they can take them into account during the development process.

“Panaya is an essential tool for anyone starting a new role in Salesforce. It is valuable when joining a new company or working with colleagues and is a must-have for any Salesforce professional.”

Keren Dubin, Director of Sales & Revenue Operations

THE SOLUTION

Clinical ink looked for an Impact Analysis solution to help optimize their org without risking existing configurations. After looking at several solutions, they chose Panaya to be the most comprehensive.

At the time, they were embarking on a major Salesforce project that necessitated thorough planning. Panaya assisted them in quickly and efficiently mapping the metadata, providing all the information required for the project with minimal risk. Going forward, Clinical ink anticipates undertaking projects related to CPQ and is confident that Panaya will play a crucial role in the planning and implementation of each project.

Clinical ink regularly relies on Panaya when implementing changes. It helps them gain visibility and understand the consequences of the changes in advance. This could not be achieved without Panaya.

“Panaya has been extremely beneficial. It eliminated the need for me to constantly ask my team about the location of certain issues, and it enabled me to quickly make changes when requested by end-users. I think that this is a core solution that everyone needs.”

Keren Dubin, Director of Sales & Revenue Operations

THE EXAMPLE

The admins that designed Clinical ink’s org utilized tasks for specific business processes, resulting in the creation of five different task reference types. Each of these task reference types possessed its own set of fields. The problem was that Salesforce does not support so many fields on a task object, so the team had no choice but to delete some of these fields. However, they needed to analyze these fields before removing them.

In this case, Clinical ink relied on Panaya to figure out which fields to delete, what page layout they were on, and whether these fields were referenced in any automation. They could not do this effectively without Panaya.

THE RESULT

Panaya showed Clinical ink how to easily understand elements that previous admins configured years ago, such as email alerts and processes running in the backend and not part of any layouts.

Whether they are optimizing the org, converting Process Builders to Flows, cleaning up the org, or just managing day-to-day changes, Clinical ink can trust Panaya to produce results that would have taken them days to achieve without it. With Panaya, it takes only a matter of minutes to accomplish these tasks.

ABOUT PANAYA

Panaya enables organizations to accelerate application change and continuously deliver innovation with its Change Intelligence Platform. Panaya provides cloud-based application delivery and testing solutions that ensure collaboration between Business and IT. Enabling enterprise agility with faster release velocity and uncompromising quality, Panaya delivers an optimized user experience with end-to-end visibility of the application lifecycle. Since 2006, 3,000 companies in 62 countries, including a third of the Fortune 500, have been using Panaya to deliver quality changes to enterprise ERP & CRM applications.