# Panaya

# SKAI: ELEVATING SKAI'S SALESFORCE EFFICIENCY AND RAPID BUSINESS EVOLUTION WITH PANAYA

How Skai Leveraged Panaya to Boost Salesforce Operations and Achieve Salesforce Excellence

## skai

**CUSTOMER PROFILE:**

Software Development

**WEBSITE**:

https://www.skai.io/

**LOCATIONS:**

HQ: Tel Aviv, Israel
San Francisco, CA, USA

**THE NEED:**

- Handle the dynamic requirements of a fast-evolving tech company
- Address complexities originating from unused customizations and apps
- Support diverse Salesforce users, ensuring data reliability
- Resolve technical debt
- Transition to new automation tools

**THE IMPACT:**

- Faster delivery to stakeholders
- Quick and easy discovery of every business request
- Rapid response to user tickets
- More time to focus on innovation and bringing value to the business
- Org optimizations and reduction in technical debt

## ABOUT SKAI

Skai (formerly Kenshoo) is a leading omnichannel marketing platform that uniquely connects data and performance media, enabling marketers to make informed decisions, achieve high efficiencies, and optimize returns. Backed by nearly two decades of innovation, Skai empowers leading brands and agencies worldwide to effectively manage large-scale omnichannel digital campaigns across all walled garden media.

## THE CHALLENGE

Skai's Salesforce org, actively operational since 2011, had evolved into a sophisticated network of customizations, third-party applications, and legacy automations. The system had been tailored over the years to meet unique business needs, but many of these customizations were no longer in use, making the platform heavy and complex. Furthermore, the dynamic nature of Skai's business required frequent updates to the Salesforce platform, affecting the product portfolio, sales process, and pricing. These changes often had a direct impact on core processes, requiring a thorough investigation of the process, the necessary changes, and the potential impact of these changes.

In addition to the sales team, other departments including finance, legal, and HR also relied on data from Salesforce. This meant that any change request had to be evaluated not only for its impact on sales processes, but also on the data and reports that other teams relied on.

Over the years, technical debt accumulated in the system, further complicating the situation. Salesforce's transition to new automation tools required Skai to review and potentially rebuild hundreds of process builders and workflow rules, some of which were created a long time ago.

*"Panaya is like a roadmap for our Salesforce operations. It automates tedious manual investigations, allowing us to make informed decisions."*

**Tammy Levin,** *Director of Information Systems, Skai*

## THE SOLUTION

Panaya was brought in to streamline the investigation process for every change, from fulfilling new business requirements and optimizing the platform, to cleaning up technical debt and adapting to Salesforce changes. With the click of a button, Panaya identifies the components connected to a change and predicts the direct and indirect impact. This replaced the need for manual investigation by multiple employees, saving time and resources.

Panaya "Free Text Search" was another significant advantage. It allowed Skai to identify hard-coded processes in the Salesforce system, some of which included the names or email addresses of people who had changed positions or left the company. Without this feature, it would have been almost impossible to know if a person was part of an approval process or was supposed to receive an email that now needed to be directed to someone else.

> **"Tasks that could have required a whole month of planning and discovery are now accomplished with just a few clicks using Panaya. It empowers us to work efficiently and confidently, minimizing unnecessary risks."**

**Tammy Levin,** *Director of Information Systems, Skai*

## THE RESULT

The implementation of Panaya, led to a significant improvement in the efficiency and effectiveness of Skai's Salesforce operations. The tool's ability to quickly identify the components connected to a change and predict the direct and indirect impacts, streamlined the process of updating the platform. This resulted in faster delivery to stakeholders and a more rapid response to user issues, which is crucial in to Skai's dynamic business environment.

Moreover, Panaya enabled Skai to undertake projects that would have been too time-consuming without this tool. These initiatives, due to their intricacy and the resources required, might have been postponed or indefinitely put on hold. With Panaya, Skai could confidently take on these projects, knowing that the tool would streamline the process and significantly reduce the time and effort required. This opened up new avenues for Skai, allowing them to continually improve and optimize their Salesforce operations, and ultimately, drive their business forward.

This, along with the tool's ability to highlight unused or irrelevant components, helped Skai reduce their technical debt and optimize their system. As a result, the Salesforce team was able to dedicate more time to innovation and bringing value to the business, rather than getting bogged down in the complexities of an outdated and heavily customized system.

## 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 teams. 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