Panaya

THE POWER OF VISIBILITY: SOHONET'S SALESFORCE OPTIMIZATION JOURNEY WITH PANAYA

How Sohonet's Salesforce Team Used Panaya to Streamline Processes, Resolve Issues Quickly and Ensure Success

sohonet

CUSTOMER PROFILE

Information Technology & Services

WEBSITE

http://www.sohonet.com

LOCATION

Global

NEED

- Gain better visibility and understanding of a heavily customized Salesforce org
- Identify complex areas that can be simplified
- Reduce troubleshooting time
- Minimize technical debt and clean up the org
- Understand the impact of proposed changes to the Salesforce org

THE IMPACT

- Improved and data-driven planning of changes
- Investigating and resolving issues quickly
- Gain confidence in managing the org efficiently
- Org clean up and optimization
- Implement changes with greater confidence

ABOUT SOHONET

Sohonet has an established heritage in connecting media businesses with their customers and partners, enabling a community of media companies to collaborate in the creation and delivery of exceptional content. Sohonet's "Connected Cloud Services" extend this capability to connect media businesses with storage and compute capacity anywhere in the world.

THE CHALLENGE

Sohonet has a complex Salesforce org that was implemented several years ago by a third party vendor. The org had evolved over the years, which made it difficult to identify areas that needed attention. The person responsible for managing Salesforce at Sohonet is not only a Salesforce Admin but also the company's Legal Counsel. With such a dual role, it was essential to find a solution that enables efficient management of Salesforce while balancing the demands of both roles. Therefore, they were in need of a Solution that could help them save time and quickly resolve any issues that arise in the Salesforce platform.

One of the primary pain points for Sohonet was the lack of visibility across areas of the system that would be affected by a change. This was particularly challenging since changes had been made by a number of different parties over the years (both internal and external) without always supporting documentation. The team needed to ensure that changes made did not affect other workflows, as well as identify complex areas that could be simplified. Furthermore, the team at Sohonet was seeking a solution to gain better visibility into their processes and ensure they were following Salesforce best practices, from optimizing page layouts to streamlining multiple automations on the same object.

THE SOLUTION

To address these challenges, Sohonet's Salesforce team turned to Panaya. With Panaya, the team was able to gain better visibility into their Salesforce org and identify complex areas that could be simplified. They used the solution to filter out certain elements and identify processes that were above Salesforce recommended limits.

Additionally, Panaya enabled the team to understand the connections of fields mainly around automations. This allowed the team to make changes quicky and safely and avoid affecting others' processes.

The team also used Panaya to save time investigating issues that arose, giving them confidence in their ability to resolve problems quickly.

"There are times when I suddenly realize that something strange is happening in the Salesforce system and I just don't know why. For example I can't understand why a value is being changed on a certain field. But with Panaya it's just easy to determine the cause behind such changes."

Rob Spelman, *Legal Counsel, SF Admin*

In the near future, Sohonet's Salesforce team is planning to use Panaya to redesign a central custom object that is used in many processes. Panaya is a crucial solution for this project, as it will enable the team to save a significant amount of time by quickly identifying where this custom object is used and which other components are connected to it. This will allow the team to efficiently plan and execute the redesign without spending unnecessary time investigating dependencies. With Panaya, the team can proceed with the redesign, knowing that they are not introducing any unexpected issues.

THE RESULT

By turning to Panaya, Sohonet's team gained better visibility into their Salesforce org. The solution enabled them to filter out certain elements, understand connections of fields mainly around automations, and save time investigating issues.

Panaya has also enabled the team to improve and maintain their org health by deleting components safely when needed and finding the root cause of issues and bugs. The solution has provided the team with the ability to quickly resolve any issues that arise in the Salesforce platform, saving them time and giving them confidence in their ability to manage their org efficiently. Overall, Panaya has been an essential solution for Sohonet's Salesforce team, enabling them to streamline their processes, follow Salesforce best practices, and ensure a successful outcome for org enhancements.

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.