

East West Rail

Salesforce Implementation

Challenge

Salesforce had been implemented in EWR by a previous consulting partner, but was not meeting the needs of the organisation. When originally implemented, information about business activities was scarce, and many of the original project team had left. EWR recognised the significant benefits Salesforce could deliver if configured correctly and users were properly trained.

EWR engaged Methods to improve upon the original implementation. Their goals and critical success factors for the project were to:

SINGLE VIEW achieve a single view of their customers and stakeholders.



EASIER REPORTING tag communications, stakeholders and accounts for easier reporting.



SENTIMENT TAG add a sentiment tag to any type of record to ensure proper responses.



ARCHITECTURE update and future proof the original architecture.



GO-LIVE easily onboard a call-centre, planned for go-live in 2020.



GO-LIVE deliver Improved reporting of all records in increasingly useful ways.



Background

East West Rail (EWR) are creating a direct rail connection between Oxford and Cambridge. Their mission is to decrease journey times, commuting costs and ease road congestion. EWR's role is to oversee and accelerate the delivery. They see themselves as a new breed of transport organisation, challenged by the Secretary of State to innovate within a very traditional sector and challenge the status-quo, leading to a fundamentally better experience for customers and stakeholders.

Salesforce is being used by East West Rail to manage:

- their database of interested and related parties
- outgoing email alerts and updates and mailing lists
- ensure GDPR compliance

Why did client select Methods?

EWR engaged with Methods due to our experience in public sector digital transformation using Salesforce, being able to bring experience and synergies from other related Salesforce digital transformation work.

Initially we suggested a week-long discovery to understand the current position and plan a roadmap for success with recommendations and suggestions of further enhancements.

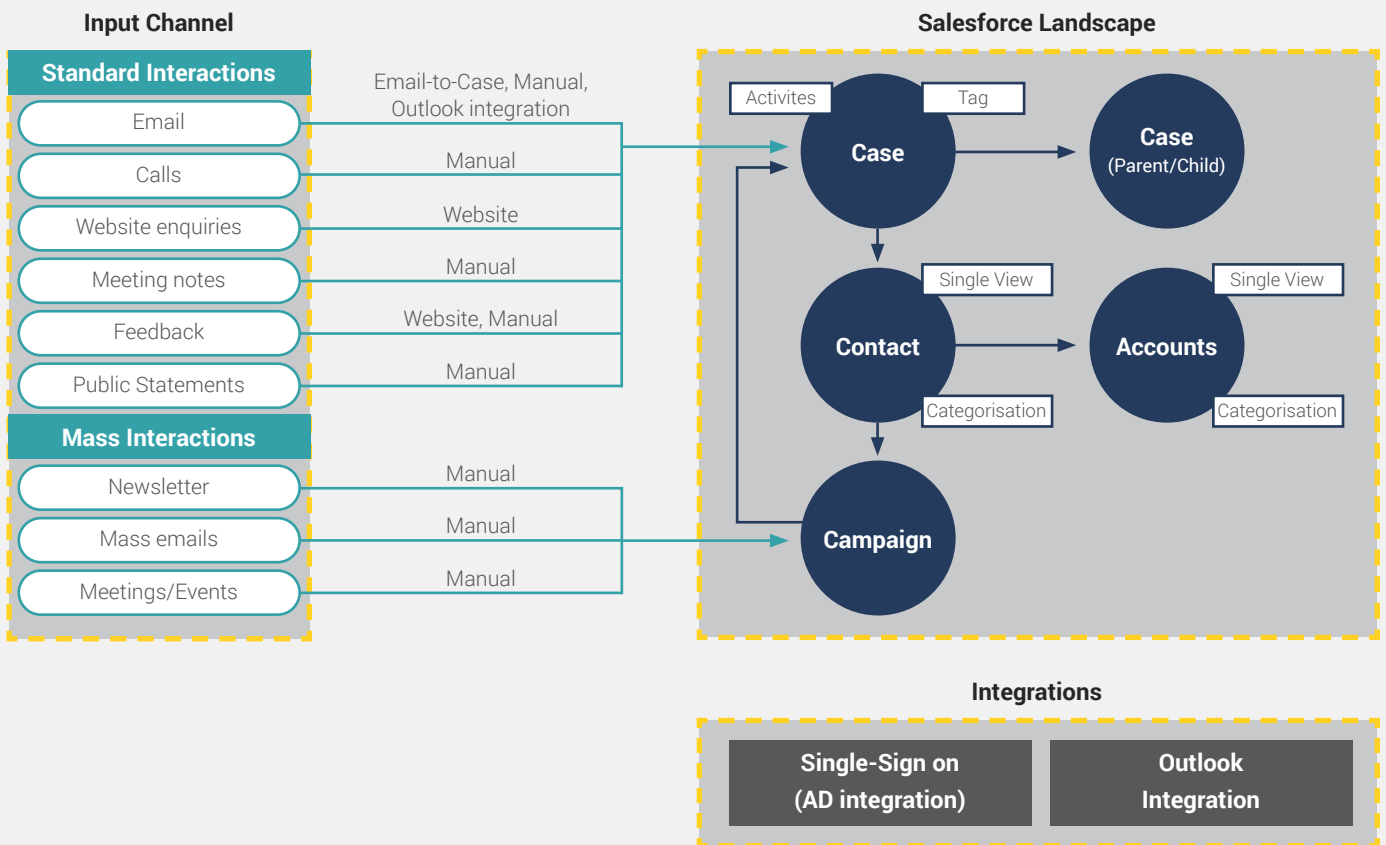


East West Rail

Salesforce Implementation

Solution

Methods proposed making changes to the data model to make it simple yet robust, filtering all interactions through the same input channel (cases), thereby making reporting, tagging and entering data much cleaner, and addressing many of the known pain points. This also allowed us to introduce new and innovative tools, including the creation of the single view of the customer.



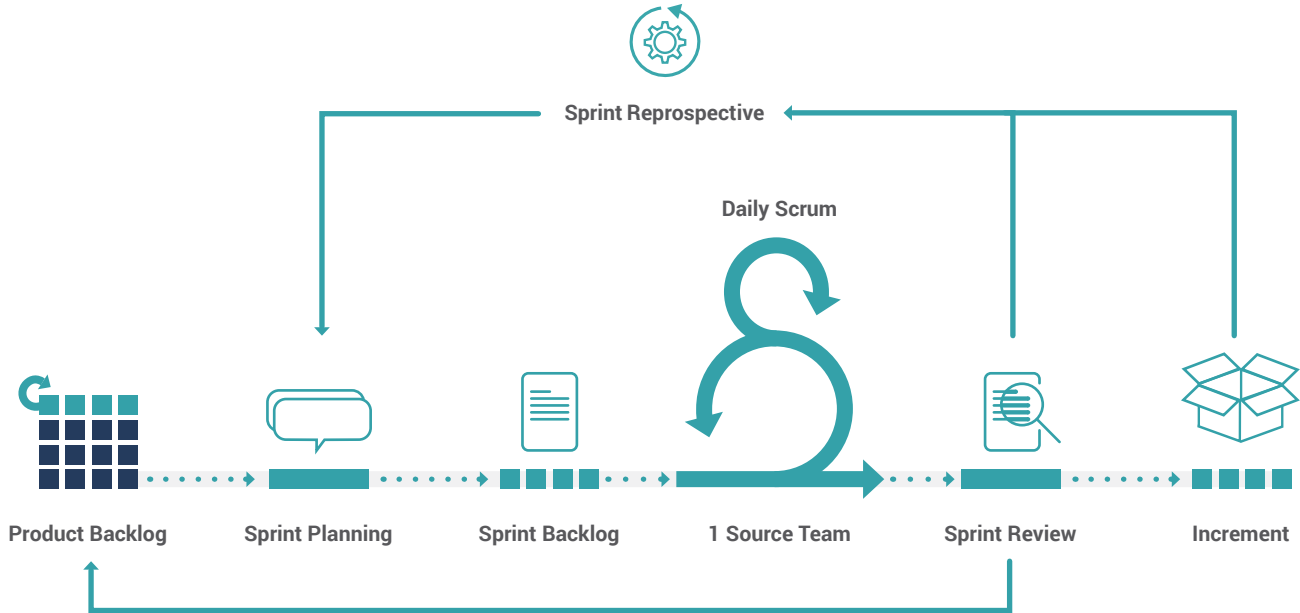
Methods used a blended team delivery model:



East West Rail

Salesforce Implementation

Delivery methodology was agile using sprints, with weekly show and tell sessions.



Results

The EWR project was successfully delivered on time and to budget, achieving EWR’s goals. The project attained high delivery velocity, allowing significant change to be completed in a relatively short space of time, through the small, focused Methods team. The project met EWR’s expectations to have a single view of their customers, the ability to tag interactions and sentiment, and to report to key stakeholders in ways they been unable to before.

Delivered on time and to budget

Internal teams are now fully engaged with the new platform and are actively involved in suggesting new features and improvements to be delivered under a Methods live Salesforce maintenance service, and to meet the objectives of future possible project phases.

What was Methods’ added value?

Methods, with their experience and expertise in the public sector space was able to quickly get up to speed, adapt to the culture and work with the client and staff to deliver a complex re-structuring project.

Helped train the internal staff

During the project, the Methods team helped train the internal staff in order to administer the system, and to make on-going improvements, with more complex work being completed through the Methods live Salesforce maintenance service.

Office locations:

London | Birmingham | Bristol | Cardiff | Chelmsford | Edinburgh | Manchester | Sheffield

