

# Enhancing Workflow Efficiency With Salesforce and ServiceNow Integration

## HIGHLIGHTS



Successful Salesforce and ServiceNow Integration



Improved Usability of ServiceNow



Reduced Response Time

## THE CUSTOMER

The customer is a cloud-based HCM (Human Capital Management) software provider and learning technology company. The company was publicly traded on the NASDAQ stock exchange until it was acquired by a private equity firm in 2021.

## THE CONTEXT

The customer was using two different platforms, ServiceNow (a cloud computing platform to help companies manage digital workflows for enterprise operations) for ticket management and Salesforce CRM to manage customer data. The sales team had to manually update the customer information on the customer complaints/query forms and assign the ticket to the right rep. Furthermore, the sales team struggled with ServiceNow's interface, leading to incomplete form submissions. This resulted in the misrouting of tickets, a delay in resolution, and SLA breaches. The lack of streamlined processes affected the team's efficiency and, in turn, the quality of service provided to their customers.

## THE OBJECTIVE

The primary objective was to address workflow challenges by integrating Salesforce CRM with ServiceNow. The aim was to empower sales representatives to navigate between these platforms seamlessly, automatically fill out form details, and ensure accurate ticket assignments, thereby enhancing operational efficiency.

## THE SOLUTION

To achieve the objective, team Grazitti did the following:

- **Single Sign-On Setup:** Unified the login process between Salesforce and ServiceNow, this eliminated the need for users to have separate credentials.
- **Custom Lightning Component:** Developed a user-friendly widget and integrated it into Salesforce's interface. This component facilitated ServiceNow interactions within Salesforce, enhancing user experience without the need to switch between applications.
- **URL Hacking:** Implemented URL manipulation techniques to automatically populate ServiceNow forms with relevant data sourced from Salesforce records. This automation significantly reduced manual data entry errors and streamlined the form-filling process.
- **Custom Metadata Design:** Designed Lightning Component using custom metadata, ensuring its adaptability and reusability across various setups within the Salesforce environment.



## THE OUTCOME

With Grazitti's support, the successful integration of Salesforce and ServiceNow brought about substantial improvements for the customer. Post-integration they witnessed streamlined and better workflow efficiency, leading to more accurate form completions, improved ticket assignments, SLA achievement, and an overall boost in operational productivity.