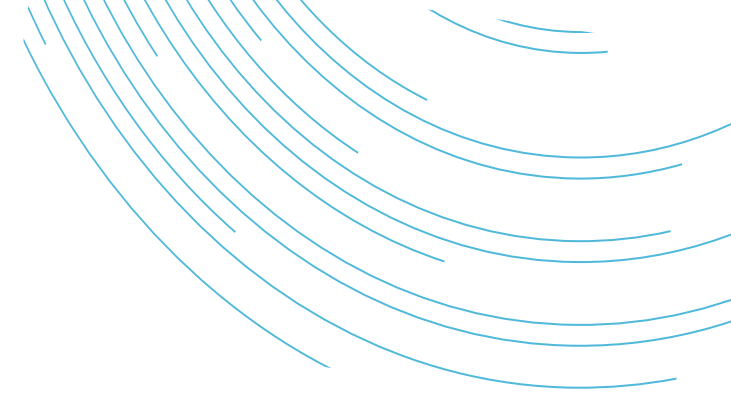




GYANSYS

Consumer Goods Playbook

Maximizing Consumer Goods Profitability through
Strategic Digital Innovation



The Consumer Goods Playbook is an industry solutions handbook drawing insights from **200,000+ hours of experience working with more than **25** organizations in the Consumer Goods sector.**

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GYANSYS

GyanSys has been a pioneer in solving Consumer Goods industry challenges for nearly two decades. With our extensive expertise in Salesforce solutions, ERP systems, middleware platforms, and domain knowledge, we navigate the complexities of the Consumer Goods realm adeptly, crafting solutions grounded in industry best practices with minimal customization.

Our team's primary focus is to blend industry insights with product expertise, unlocking the full potential of Salesforce technology and delivering swift time-to-market solutions that foster innovation. We serve as catalysts for success, ensuring tailored solutions that align with your company's direction, promoting sustained scalability.

But we're more than just service providers—we're solution architects crafting bespoke strategies to empower our clients in the ever-evolving business environment. Our profound understanding of the Consumer Goods industry and unwavering commitment to excellence guarantees results that fuel growth and realize business objectives.


We look forward to supporting you in your Salesforce journey.

Ashis Baral

Practice Director - Salesforce



“We’re more than just service providers—we’re solution architects crafting bespoke strategies to empower our clients in the ever-evolving business environment. Our profound understanding of the Consumer Goods industry and unwavering commitment to excellence guarantees results that fuel growth and realize business objectives.”

A woman with a brown backpack is pushing a shopping cart through a supermarket aisle. The shelves are filled with various products, and the scene is brightly lit. The text is overlaid on the image.

Value added in the Consumer Goods market is projected to amount to **US\$3.18tn in 2024.**

- Statista

Key Industry Imperatives

**Salesforce Helps Consumer Goods to Boost
Productivity and Drive Customer Engagement**

GYANSYS

In today's climate, what's top of mind for consumer companies and consumers are strikingly similar. Industry disruptions are nothing new, from the impact of increasing costs and keeping up with rising prices to hard-to-reach growth. Consumer companies are now facing even more - continued hardening of data privacy and product safety, the struggle to find good talent, as well as regulatory scrutiny around environmental goals. Overcoming these industry and social challenges is a steep hill to climb but there are still a lot of opportunities to thrive and scale. Industry volatility is also a great gateway to innovation and delivering long-term value, depending on how company management decides to run their organizations.

Consumer organizations find themselves with access to a large array of technological solutions and tools to ensure their business is well-prepared to tackle these challenges head-on. Digital transformation is a prerequisite to building adaptive and nimble companies but picking the right one that checks all the boxes adds additional complexity. Investing in employee productivity and operational efficiency, improving analytics processes, as well as customer data capabilities must move at the same pace as consumers and technological advancements.

Growing consumer mindset shifts and consumption challenges, as well as value proposition disruptions, drive the need for digitizing engagement and developing seamless data integration to build agility.



Accelerate Embedded Commerce & Increase Transactional Growth

Currently, a significant portion of consumers are made up of Millennials and Gen Z, immensely affecting the shift in buying behaviors. Young students and professionals now command the consumer market in how they want to be marketed to across channels with hyper-personalization. Although the pandemic sped up the transition to online interactions and ecommerce, bricks and mortar stores are still vital in the shopping process, allowing consumers to use it as a showroom, pick up or service centers and experiential hot spots.

Consumer goods companies need to adapt their strategies by focusing on blending both the physical and digital store experiences and adapting their business models to be able to unlock new opportunities. This blend of store experiences allows to diversify offerings and helps to remove friction. Customers want a consistent seamless experience wherever they are browsing on social media, chatting with customer service or leaving a customer review. Thinking holistically will help combine both these realities together that reflect consumers' evolving values.

01



Drive Employee Productivity & Operational Efficiency



02

We often encounter consumer goods companies where each department uses different tools to serve a single customer. This siloes information and engagement, creating disconnected customer experiences. Efficient retail execution is critical for consumer goods companies to ensure products are available on shelves and promotions are executed correctly. Consumer Goods Cloud provides tools for managing retail execution processes, including store visits, merchandising, and promotions, improving visibility and execution efficiency. This robust platform also provides field representatives with a powerful and intelligent solution to improve in-store experiences and streamline operations.

GyanSys has empowered companies to streamline store performance tracking effectively and attain comprehensive KPI visibility, fostering continuous enhancement. Our solutions offer a holistic 360-degree perspective, facilitating seamless customer onboarding and delivering exceptional end-to-end service experiences.

Simplify Promotions Planning

Managing trade promotions effectively is a challenge for consumer goods companies due to complex agreements, pricing structures, and promotional activities. Many account managers struggle to optimize their trade activities and better allocate their trade investments, as well as track account health. This is also due to Trade Promotion Management (TPM) platforms often being separated from other systems, making them harder to use. The ever-evolving market landscape coupled with intricate data management challenges, consumer companies must remain vigilant in embracing technological advancements to enhance cost efficiency and bolster profitability.

03



Salesforce Consumer Goods Cloud streamlines trade promotion management processes, enabling companies to plan, execute, and analyze promotions more efficiently. More specifically, effective promotion planning, and execution can be accomplished through several capabilities - a single view of promotion executions and forecasting, field service route management, fund management visibility, a promotions library, integrated trade calendars, and post-event reporting. Consumer Goods Cloud brings all these functionalities together into one integrated and unified robust system.

04

Increase Analytics Capabilities Through Digital Transformation

Consumer goods businesses need a real time customer profile to effectively evaluate and assess brand loyalty and customer relationships. To do this, companies need to fully leverage data and insights to transform business models by embedding resilience and agility into their operations through digital transformation. Although technological immaturity and complexity are a challenge, automation is a non-negotiable for keeping up with the trends.

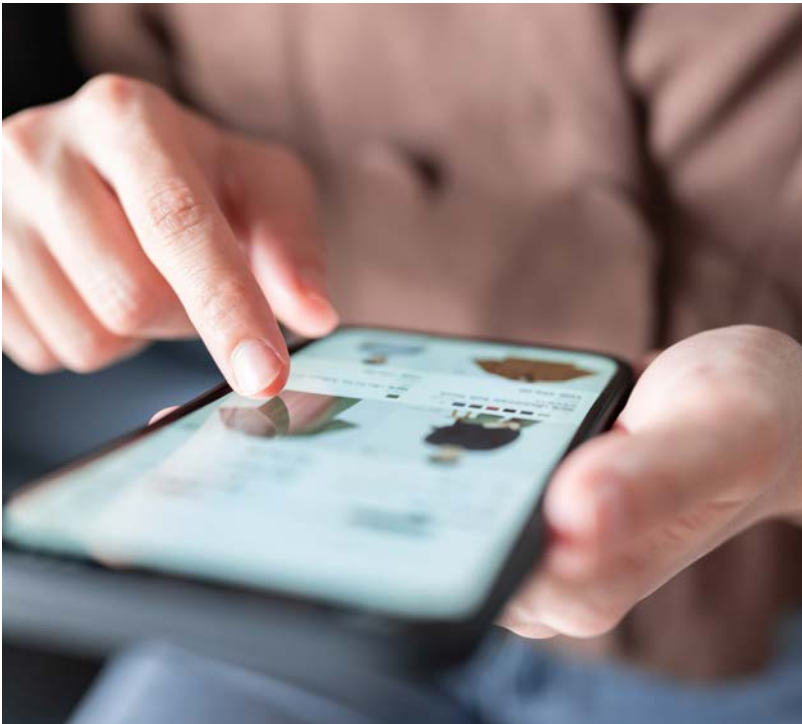
Analytics and technology have transformed the business landscape to bridge the gap, allowing consumer goods organizations to reduce cost, improve operational efficiency, optimize KPI measurement, and drive engagement. Retail execution technologies such as Salesforce Consumer Goods Cloud allow organizations to keep up with the rapid pace of technology which also influences how customers behave and access the world.



Consumer Goods businesses strive to maintain customer trust in uncertainty and evolving industry shifts. Consumers seek more meaningful connections with businesses that are beyond basic expectations and achieve customer-centric interactions. This has pushed organizations to focus on implementing solutions to automate processes and help echo the in-person shopping experience online.

Build Trust & Deliver Effective Commerce Experiences

Companies must work towards faster response times, automate support tasks, product quality and reliability, integrating systems for a smooth flow of data, tracking metrics to understanding customer behavior, and delivering multiple channels for customers to communicate. Salesforce technology helps to integrate personalized digital interactions through curated omnichannel experiences, infusing personalized purchasing experiences within website navigation, customer service, and post-purchase follow-up to boost revenue. GyanSys has streamlined internal and external customer workflows through digital transformation, leveraging AI and data analytics, and developing custom platforms and apps.



05

Hedging Against Tighter Consumer Spending

06



As consumers become more price-conscious, businesses need to look beyond the price tag to add value and drive growth. We are in an interesting time where consumers feel distracted and overwhelmed, revealing intriguing shifts in behavior. Currently, top-of-mind for many is the reevaluation of priorities and the definition of value, beyond what consumers want or need. As consumers set personal budgets, this presents an opportunity for consumer goods companies to be innovative and inspire powerful brand connections.

Salesforce Consumer Goods Cloud helps unlock the right insights for teams to deliver transparent and personalized experiences to build stronger relationships. This ensures interactions between your sales or customer support teams and customers are seamlessly captured within a unified platform. While also enabling field workers to access pertinent information, empowering them to deliver delightful and impressive service experiences. GyanSys has helped organizations grow margins and achieve optimized account planning and field operations with automated intelligent tools.



GyanSys **at a Glance**

What Sets Our Company Apart



GYANSYS

350+

Customers
with over **95% retention**

2000+

Global Team

8

Global Locations &
Delivery Centers



Salesforce Practice

4.8 / 5.0

CSAT

1000+

Salesforce Certifications

200+

Consultants Globally

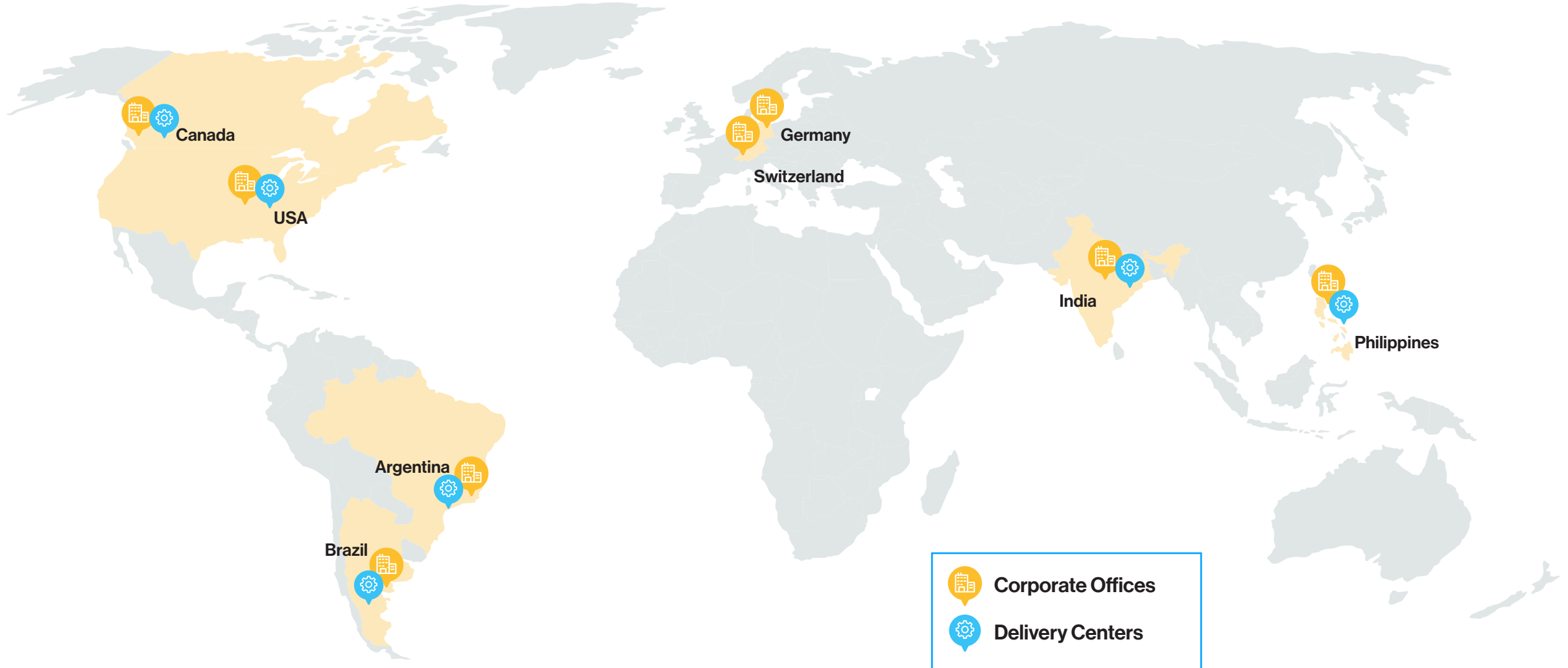
600+

Salesforce Engagements

GYANSYS

Global Delivery Centers

24/7 Coverage



GYANSYS

Salesforce Solutions Expertise



Household Products



Experience Cloud



Sales Cloud



Service Cloud



Support Services



Developer & Integration Services



Release & Change Services

Experience Cloud



Sales Cloud



Service Cloud



Marketing Cloud



Consumer Goods Cloud



MuleSoft



Field Service



B2B eCommerce



CPQ





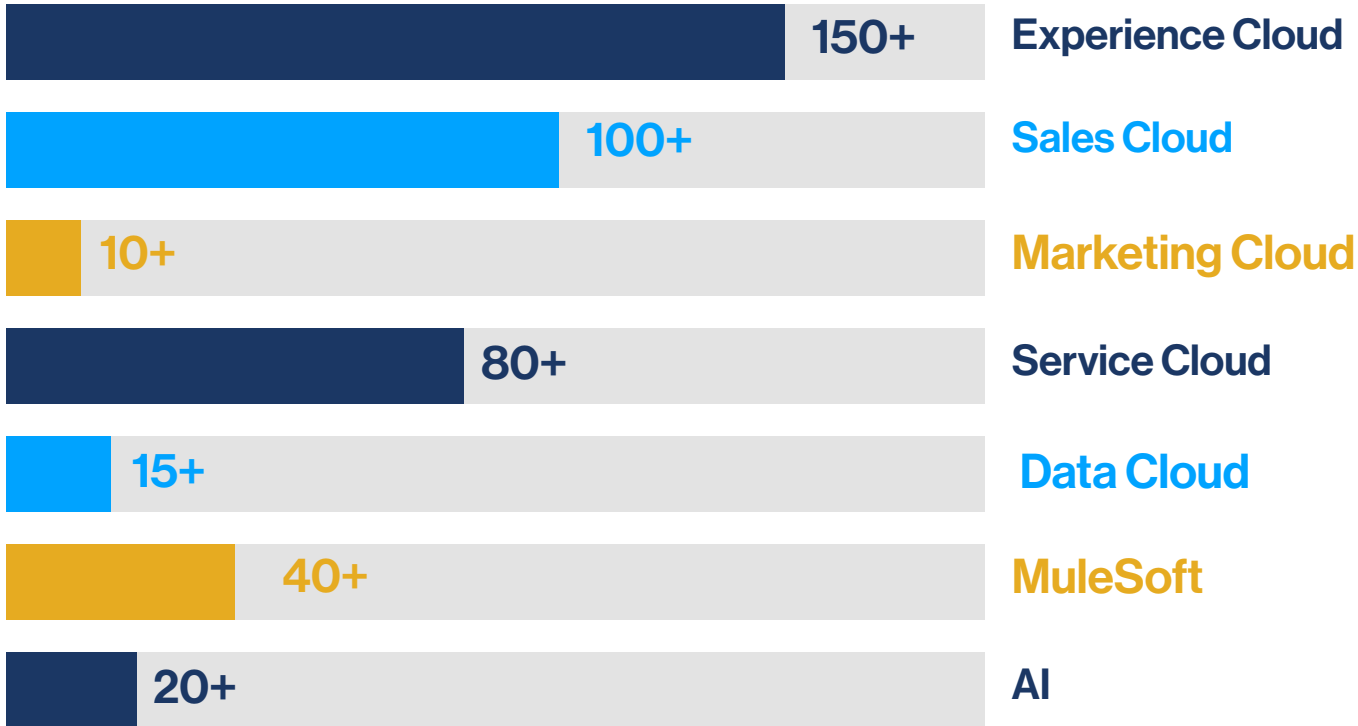
Expertise in Consumer Goods

**Key Salesforce implementations for
Consumer Goods Industry**

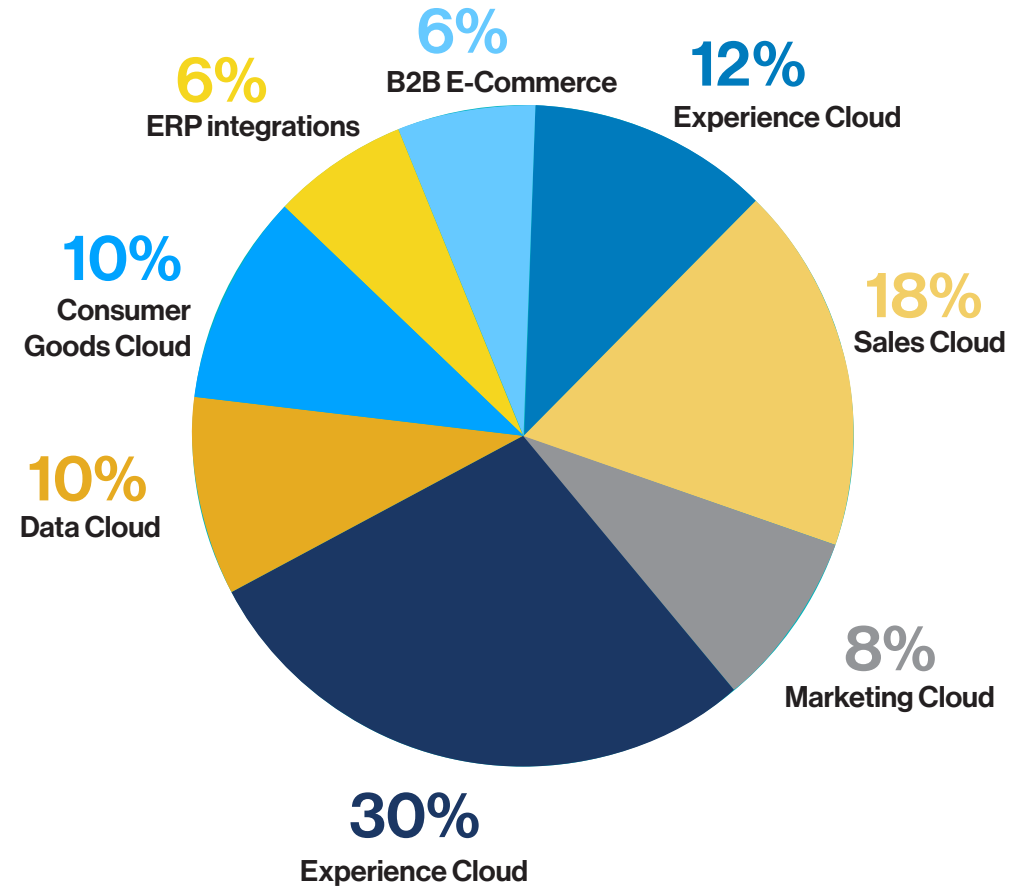


GyanSys by the Numbers

Salesforce Accreditations & Certifications



Salesforce Projects in Consumer Goods





**Salesforce named GyanSys as a
Top 25 Partner within Consumer
Goods industry in North America.**

Salesforce Consumer Goods Cloud Capabilities Matrix for Retail Execution and Trade Promotion Management

Industry Imperative: Accelerate Embedded Commerce & Increase Transactional Growth

Key challenges and opportunities

Provide additional channels for consumers to purchase from your brand



Salesforce Consumer Goods Cloud capabilities

Salesforce Commerce Cloud enables consumer goods companies to build and customize digital storefronts, manage product catalogs, process orders, and optimize the online shopping journey to drive conversions and increase sales directly to consumers.

Experience Cloud is designed to create self-service support communities, gather feedback and insights from customers, and foster brand advocacy and loyalty among DTC customers.

Forecasted increase in demand for personalized marketing



Personalize messages across multiple channels using Marketing Cloud Engagement

Industry Imperative: Drive Employee Productivity & Operational Efficiency

Key challenges and opportunities

Complexity in managing retail execution processes

Field Sales Reps may be unable to access system information without a network connection

Streamline task execution during visits and improve field rep efficiency

Repetitive administrative work

Improve manufacturer-retailer relationships



Salesforce Consumer Goods Cloud capabilities

Manage retail execution processes, including store visits, merchandising, and promotions to improve visibility and execution efficiency.

Consumer Goods Cloud mobile app offers offline functionality for field reps to view and complete their tasks without an active network connection.

Sync visit tasks with the Consumer Goods Cloud mobile app for field reps to access on the go.

Leverage templates, or copy and edit existing promotions to streamline the planning process.

Reconcile claims to promotions for efficient settlement and dispute resolution using Claims Management in Salesforce Consumer Goods Cloud . Salesforce Consumer Goods Cloud also supports trade promotions to improve brand awareness, better shelf placement at retail stores, and increase sales volume.



Industry Imperative: Simplify Promotions Planning

Key challenges and opportunities

Complexity in managing and coordinating trade promotions with multiple business partners

Visibility into business performance

Visibility into trade spend (budget)



Salesforce Consumer Goods Cloud capabilities

Manage multiple trade promotions with retail partners on a shared trade calendar.

Review insights to gain visibility into forecasted performance vs. target to identify where promotions are required to fill the gap (accounts, categories, products).

Gain visibility into tracking budget information using Fund Management.



Industry Imperative: Increase Analytics Capabilities Through Digital Transformation

Key challenges and opportunities

Inefficient visit scheduling and route planning



Visibility into trade promotion effectiveness



Lack of data accuracy



Manual KPI calculations



Salesforce Consumer Goods Cloud capabilities

Visit and task recommendations with Salesforce Einstein for Consumer Goods Cloud.

Build Salesforce reports to gain visibility into trade promotion effectiveness and see where promotions are required to meet sales targets.

Data validation in Salesforce ensures that valid values are entered for fields, while an integrated platform enables a unified view of the same data.

Define and automate KPI calculations in Salesforce, and report on these key metrics to increase visibility and identify important trends.



Industry Imperative: Build Trust & Deliver Effective Commerce Experiences

Key challenges and opportunities

Lack of visibility into inventory levels

Personalized digital experiences



Salesforce Consumer Goods Cloud capabilities

Manage inventory levels using Inventory Management to ensure that retailers have enough product in stock.

Personalize digital experiences with Marketing Cloud and Experience Cloud by tailoring online interactions and content to meet the specific preferences and behaviors of individual users or customer segments.



Industry Imperative: Hedging Against Tighter Consumer Spending

Key challenges and opportunities

Price conscious consumers



Salesforce Consumer Goods Cloud capabilities

Offering competitive prices, promotions, and value-added benefits can help attract and retain price-conscious consumers while driving sales and revenue growth.

Promotions in TPM can support a volume-based selling strategy to keep prices low while maintaining profitability.

Product diversification



Manage the product mix in Salesforce Consumer Goods Cloud and leverage reporting to evaluate product performance and make decisions on the optimal product mix.



Cross-Cloud Solutions for Consumer Goods



The traditional consumer goods industry is experiencing significant disruption, with e-tailing setting new standards for consumer experience expectations. Socio-economic shifts shook the retail and consumer goods industry when it came on the scene. Elevating key trends such as enhanced personalization, omnichannel support, artificial intelligence and chatbots, and self-service assistance. Many businesses transitioned to an online presence when physical retail stores closed their doors during the lockdowns. Fast forward a few years later and physical retail stores are reopening their doors to the public. As a consumer goods manufacturer, the pre-pandemic retail business challenges become apparent once again: How do we manage our relationships with our retailers? How can we track and optimize store visits for our field reps? How do we ensure retail store compliance and avoid stockout?

Salesforce technology plays a pivotal role in enhancing the efficiency of internal business processes for companies, all while nurturing and expanding relationships with retail partners. It facilitates seamless coordination of retail store visits for field representatives and ensures effective management of retail store compliance. By leveraging Salesforce, consumer goods companies can forge stronger connections throughout the entire B2B2C value chain, fostering greater collaboration and synergy.

Consumer Goods Customer Experience Trends



Personalization



Omnichannel support



Artificial intelligence and chatbots



Self-service assistance



Consumer Goods Cloud

Salesforce developed Consumer Goods Cloud with a specific focus on optimizing industry requirements, particularly in areas like retail execution and fostering stronger relationships with retailers. Its core features encompass essential capabilities and business processes for consumer goods companies, including sales execution, retail execution, trade promotion management, inventory management, and integration capabilities with ERP systems.

At GyanSys, we recognize the imperative for consumer goods organizations to digitize processes. Through our tailored solutions, we provide insights into product placement, stock levels, and promotional compliance, along with continuous monitoring of ongoing promotions. Our expertise facilitates enhanced collaboration between consumer goods companies and retail partners, streamlining tasks such as merchandising, promotions, and issue resolution. Leveraging the robust features of Consumer Goods Cloud, we enable efficient tracking and visibility through automation, ensuring seamless operations.



Deep Dive: Enhancing Retail Execution through Data Accuracy

As a family-owned business, Jack Link's needed a connected internal system to simplify data processing accuracy and efficiency, ultimately enabling superior customer service.

Project Highlights:



Increased Data Processing & Forecasting Efficiency



Improved Retail Execution Processes



Enhanced Inventory Management Accuracy

Jack Link's required comprehensive management of their product and sales data in order to facilitate the expansion of their business. Leveraging our proficiency in Salesforce technology, we equipped them with a holistic view of both customers and employees, thereby enhancing the efficiency of essential B2C processes.

By harnessing the capabilities of Salesforce's Consumer Goods Cloud, our project addressed various facets such as Inventory Management, Opportunity and Sales Management, and crucially, Retail Management. Through territorial segmentation, we optimized visit planning for their sales representatives using Salesforce maps. Additionally, we seamlessly integrated their existing ERP system with Salesforce, fostering business growth.

Action Plan		
Status	Owner Name	Start Date
Not Started	Admin User	7/22/2020
Items		
Assessment Tasks (6)		
NAME		REQUIRED
Promotion Check		<input type="checkbox"/>
Inventory Check		<input type="checkbox"/>
Assets Check		<input type="checkbox"/>
In-Store Surveys		<input type="checkbox"/>
Capture Orders		<input checked="" type="checkbox"/>
Planogram Check		<input type="checkbox"/>



Polar 400 L Glass door display

Overall Compliance

Endcap | Overall condition: True

Yes

No

Product Compliance

GoBar Cranberry - Vegan, 2oz - 6 Pack
P2-010-006

Endcap | Facings: 5 Unit

Chatter Favorites Search Notifications Menu

4:21 PM 100%

All Appointments

Today • Wednesday, Sep 8
You have 6 visits

9:30 AM WEDNESDAY, SEP 8

ACME Groceries #1054
Scheduled
1 Market St, San Francisco, CA 94105

10:30 AM WEDNESDAY, SEP 8

Cumulus Unlimited
Scheduled
767 Crane Ave, Foster City, CA 94404

1:11 PM 100%

ACCOUNT VISIT
ACME Groceries #1054
Driving • September 8, 2018, 9:30 AM

OVERVIEW VISITS DETAILS RELATED FEED

ACCOUNT APPOINTMENTS (2/6)

Wednesday • Sep 8 2018
9:30 AM
1 Market St
San Francisco, CA 94105

GET DIRECTIONS

ETA: 7 mins.

Deep Dive: Reaching New Heights with Consumer Goods Cloud

As a Consumer-Packaged Goods company, Erie Meats partners with restaurant chains and food distributors that require a CRM for their specific industry needs.

Project Highlights:

40%

Faster Collaboration & Decision Making

24%

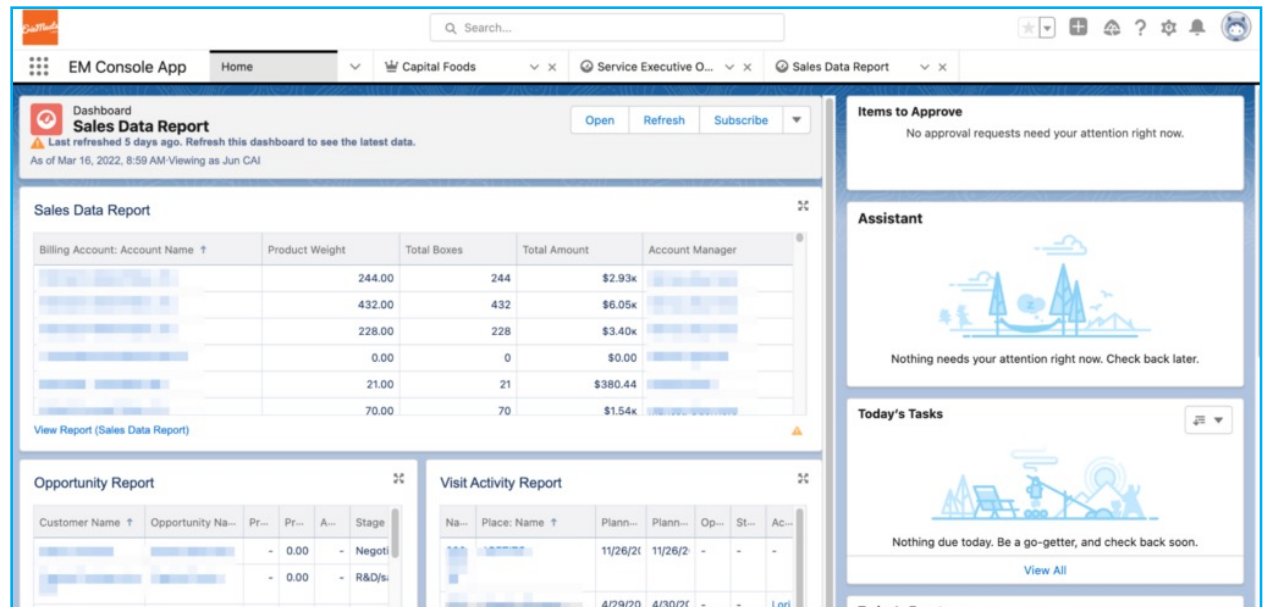
Increase in Revenue Generation

45%

Faster Analysis of Business Data

GyanSys deployed a successful CRM implementation to deliver consistent and standardized processes across their teams, and automated manual activities to improve user experience. Erie Meats team now has a compelling user interface to view all management information related to sales in a single location and review historical information too. This also includes access to key insights related to the accounts and deals they are working on to manage their tasks, track deals, and improve customer experience.

With the Consumer Goods Cloud implementation, sales representatives can collaborate with managers and others within the organization. Salesforce technology allows representatives to update their in-flight deals and make sure information is accurately reflected in the application. Additionally, managers can view all activities on sales rep's specific accounts and upcoming account visits. With compelling UI managers and representatives have more visibility into accounts from a single location.





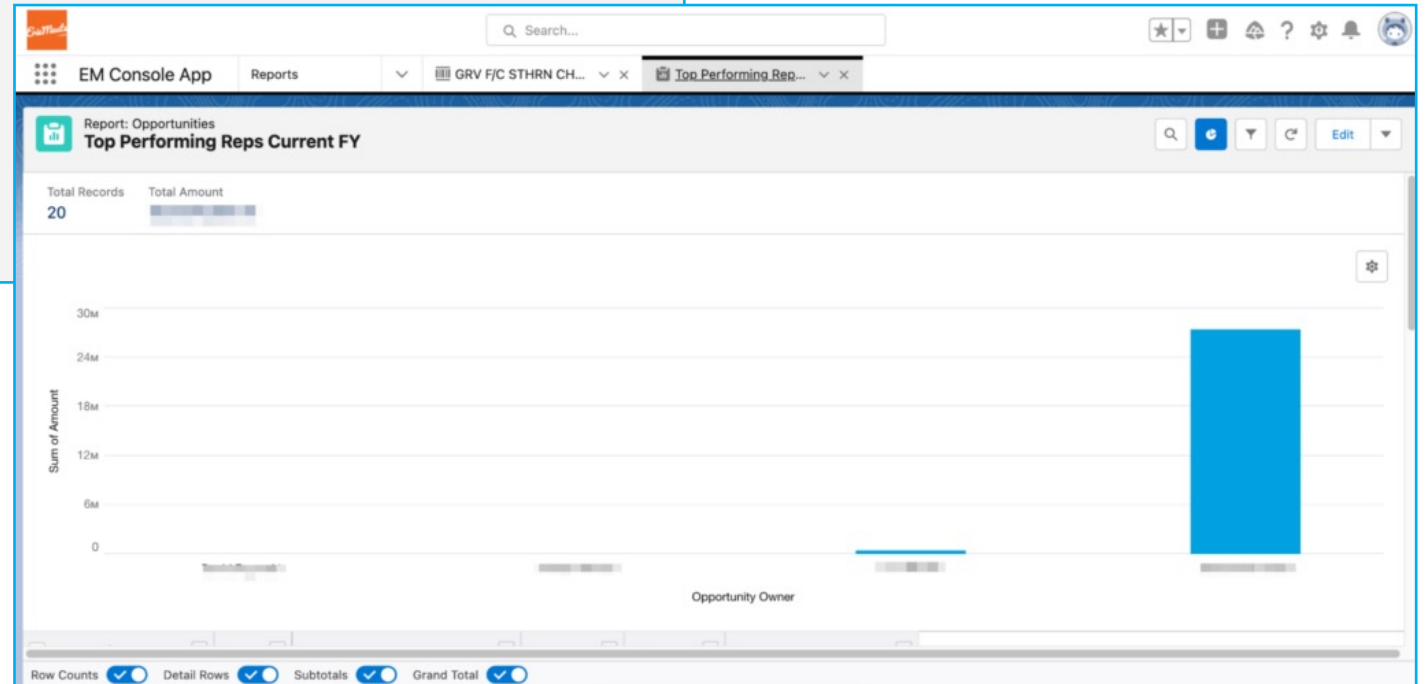
EM Console App | Visits

Annual Forecasts V... | Activities by Salesp... | Sales Team Reports | Sales Data Report

Visits All

6 items • Sorted by Name • Filtered by All visits • Updated a few seconds ago

Name	Retail Store	Status	Visit Priority	Planned Start Time	Actual ...	Planned End Time	Actual ...
00000008		Planned	High	12/2/2021, 10:30 AM		12/2/2021, 11:30 AM	
00000010		Planned	Low	11/26/2021, 12:00 PM		11/26/2021, 8:30 PM	
00000011		Planned	High	4/29/2022, 12:00 PM		4/30/2022, 12:00 PM	
00000012		Planned	Medium	6/22/2022, 8:00 AM		6/26/2022, 11:00 AM	
00000013		Planned	High	12/27/2021, 10:00 AM		12/27/2021, 11:00 AM	
00000014		Planned	High	2/4/2022, 12:00 PM		2/4/2022, 1:00 PM	





Experience Cloud

Irrespective of the product category, Experience Cloud equips companies with the tools to effortlessly deliver connected customer experiences, accompanied by invaluable insights. By removing constraints on how, when, and where customers can interact with your brand and make purchases, offering unparalleled freedom and flexibility for a seamless experience.

At GyanSys, we've undertaken numerous projects to deploy mobile apps directly to the Apple App Store and Google Play Store, empowering customers and digitizing internal operations. Moreover, we collaborate closely with consumer goods companies to provide employees with automation tools that boost productivity, especially when extra effort is required, to facilitate organic growth and simultaneous margin expansion, ensuring sustained success.

Read our additional resources:
[PRM White Paper](#)

Deep Dive: Empowering Employees to Elevate Customer Service

Sally Beauty wanted to provide their distributor sales consultants with a holistic view of their customers, and the tools to serve them better.

Project Highlights:



Reduction in Case Volumes

3%

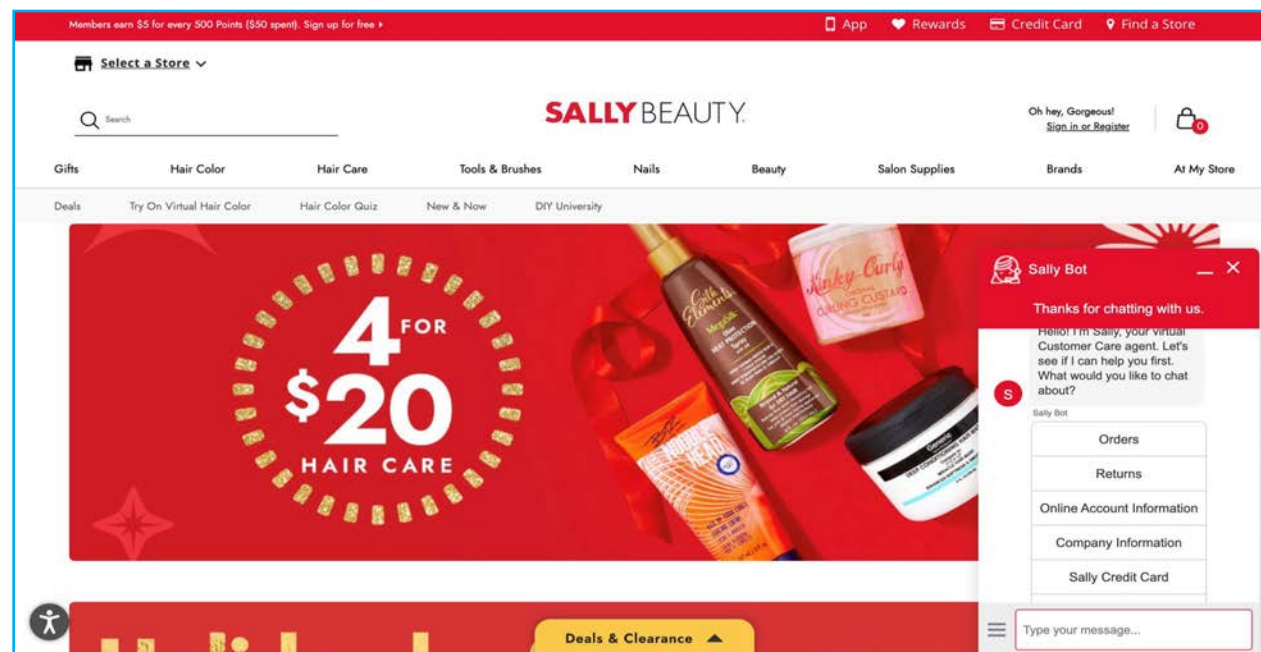
Increase in Active Customers Per Month

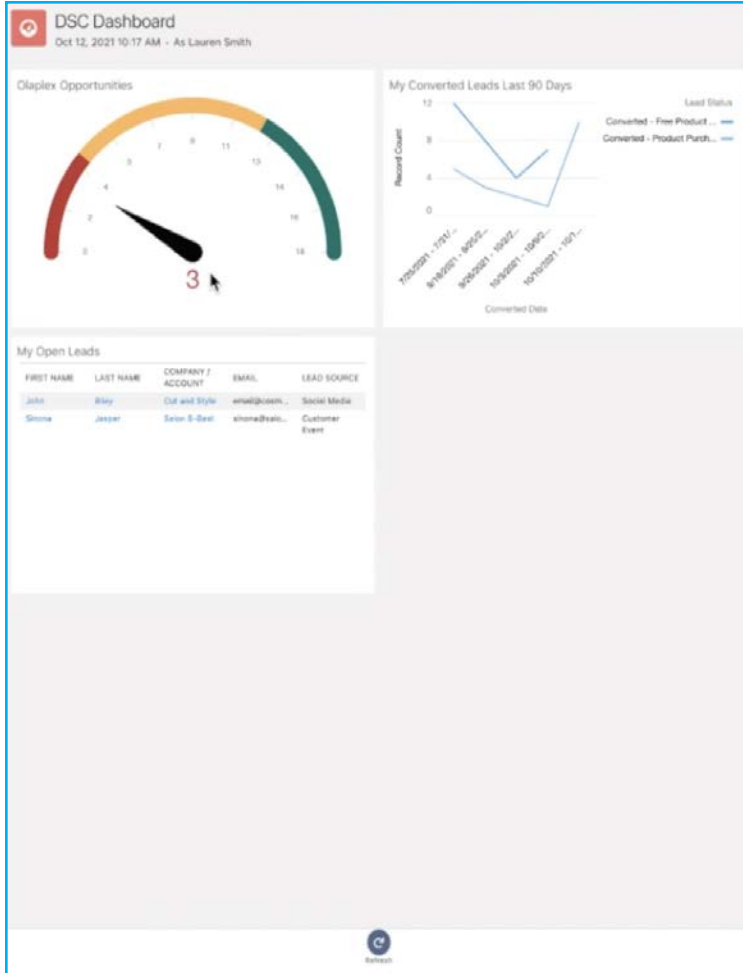
7

Einstein Bots delivered in 7 days

Sally Beauty did not have any deflection mechanisms in place and as a result, their case volumes exploded, with customers going days without a response. GyanSys delivered an initial version of Einstein Bots in just 7 days. They saw a significant reduction in case volumes and achieved a broader service transformation using Salesforce technology including extending bot use cases. They increased 3% in active customers per month.

In addition, collaboration with distributor sales consultants on new leads, target lists, monthly quotas and performance goals was happening through Smartsheet and Tableau reports. Due to information being siloed or not readily available, the team's ability to personalize and provide in-depth recommendations based on previous sales while onsite was reduced. Our team leveraged Salesforce technology to create dashboards to give them the crucial capability to view information for leads and customer data in a single place.





10:58 AM Tue Oct 12
Lauren Smith
sallybeautyholdings...

Mobile Home

- Tasks
- Notes
- Chatter
- Groups
- RECENT
- Contacts
- Leads
- Accounts
- Posts
- Opportunities
- Knowledge
- Cases
- More
- APPS
- Reports
- Dashboards
- Provide Feedback
- Settings
- Help
- Log Out

Upcoming
No upcoming Tasks
All Tasks New Task

My Calendar
Today
No events today
All Events

Recent

- SalonA2C Beauty Account - 0001110000
- KAREN KELLY Contact
- Claplex Assistance Group
- Claplex New Line Knowledge
- DSC Dashboard Dashboard

Favorites

- DSC Dashboard Dashboard

How useful is this feature?
Home is a new mobile feature. Let us know what you think.

10:07 AM Tue Oct 12

SalonA2C Beauty
SalonA2C - (000) 111-0000 - Test CosmoProf Card 1

CHATTER DETAILS RELATED

Account Information

Account Number 17298471	Card Number Test CosmoProf Card 1
Account Name SalonA2C Beauty	Attention To
Salon Name SalonA2C	Email Address camuser@cosmoprof.com
Mobile (000) 111-0000	Valid Email
Work (000) 111-0000	Contact Name KAREN KELLY
Home	Salon Speciality Texture/Curl
Account Status ACTIVE	Salon Professional

Existing Credit Terms
CREDIT CARD

Requested Credit Terms

Prof Lic Expiration Date

Professional Lic#
11111111111111111111

Email OK

Salon Type
Booth Rent

Number of Chairs
11+

Deep Dive: Decreasing Overhead with Salesforce Technology

Mary Kay needed a complete overhaul to consolidate multiple non-integrated systems into a single integrated platform. This was a massive transformation of 37 markets and 3+ million users.

Project Highlights:



**Increase in Traffic
and Revenue**

37

**37 Markets
Launched**

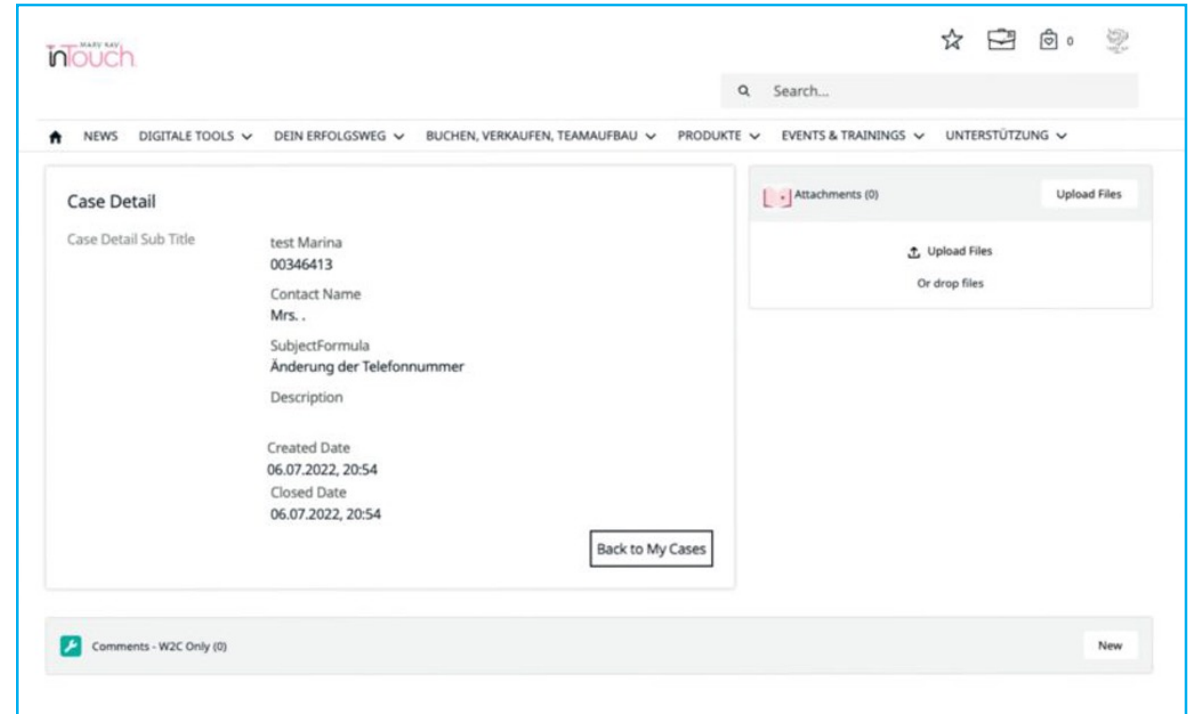
3

**3 million Users
supported**

Our main objective was to provide faster systems to accelerate their time to market. With our unparalleled Service Cloud and Experience Cloud expertise, we implemented Salesforce technology and modernized their old established way of doing things. This included reducing the maintenance cost of multiple non-integrated IT initiatives, reducing complexity and cost of making changes, allowing faster adaptation in a competitive marketplace.

We enhanced customer support capabilities with Service Cloud and created a Connected Community for consultants to engage, connect and access information with Experience Cloud. Our team worked closely with the Mary Kay team to develop a mobile-focused UI/UX design that enhanced user experience and increased user adoption with Salesforce Mobile.

Mary Kay now has internal and external mobile-first apps that allow consultants to run their tasks from anywhere, at any time, and customers to browse products, try on products virtually, and connect with independent Beauty consultants near their location.



GYANSYS

Deep Dive: Revitalizing Tools & Processes for Human Resources

Newell Brands needed to increase efficiency in their HR Business Partners Team and HR Team while providing employees with a more streamlined and consistent user experience.

Project Highlights:



Fewer Clicks

50%

Increase in Time Saved on Normal Transactions

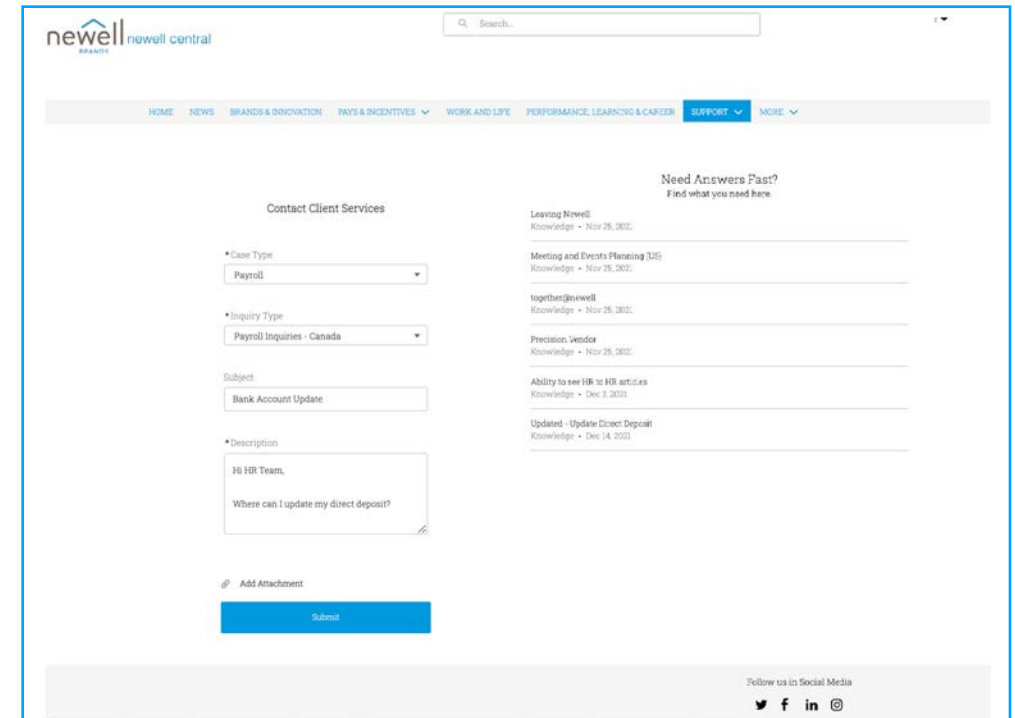
100%

Tracking with View of All Cases and Status

The Newell HR team's initial, outdated and manual, processes based on Microsoft Office (Excel, Outlook, SharePoint) caused: challenges with data inaccuracy; varying service levels; and high costs from the number of hours spent performing low-value tasks. They needed to migrate their internal HR data update, hiring/onboarding processes, and employee service requests to the Salesforce platform to provide a consistent and digitalized experience for the HR team.

We built a way for when new employees are created/updated in SAP they create employees with the right permissions or update their contact values in Salesforce. Managing Client service cases is now seamless with automated notifications to ensure they stay on top of cases. Newell HR teams can also use the new Chatter collaboration tool to communicate with both the employee and other internal staff to resolve cases efficiently.

Newell's HR team has the most updated list of employees within Salesforce, delivering real-time and errorless data. Due to this improved communication and access to data allow their team to better support their large employee base and improve the overall experience for employees.



Case 34351091

Status: Open | Created By: [Avatar] | 12/17/2021 7:22 AM | HR Form Type: HR Data Updates | HR Form SubType: Everyday Adjustments

Open | Under Review | Update in Progress | Closed

Status: Open | Mark Status as Complete

Please remember to select the employee in the Contact Name field under the HR Form Related section.

HR Form | Files | Approval History

Information

Type	Update employee's marital status	Effective Date	12/17/2021
------	----------------------------------	----------------	------------

Employee Personal Details

Marital Status	Married	Married Date	11/15/2021
----------------	---------	--------------	------------

Details | Case History

- Case Record Type: HR
- HR Form Type: HR Data Updates
- HR Form SubType: Everyday Adjustments
- HR Form Related:
 - Contact Name
 - Confidential HR Case
 - Is Employee Band 6 (Director +)
 - I attest that I have obtained approvals
- Case Information:
 - Case Number: 34351091
 - Subject: [Blank]
 - Case Owner: [Blank]
 - Description: [Blank]
 - Created By: [Blank]
 - Email Sender: [Blank]
 - Status: Open
 - Priority: Medium

Case 34351088

Status: Open | Created By: [Avatar] | 12/17/2021 7:15 AM | HR Form Type: HR Data Updates | HR Form SubType: Everyday Adjustments

Open | Under Review | Update in Progress | Closed

Status: Open | Mark Status as Complete

HR Form | Files | Approval History

Information

Type	Promotion / Demotion when a pos	*Effective Date	Dec 1, 2021
Employment Percent	50.00%	*Weekly Working Hours	20
*Action Reason	05-Full-time to Part-time	*Create Vacancy	Yes
*Vacancy Created Date	Dec 31, 2021	*HRBP Admin	[Dropdown]
*Pay Rate	[Blank]	*Basic Pay Reason	--None--

Employee Personal Details

Marital Status	Married	Married Date	11/15/2021
----------------	---------	--------------	------------

Case Information

Case Number	34351088	Subject	[Blank]
Case Owner	[Blank]	Description	[Blank]
Created By	[Blank]	Email Sender	[Blank]

Error validating Case
Error message: Entry number: '1, HRBPUserid is required'

Cancel | Save

Actions: Validate, Submit

Case Team (0)

Collaboration: Post, Email, Share an update..., Share

2m ago created this case. 34351088

Like | Comment

Write a comment...



Data Cloud

GyanSys empowers consumer goods organizations to synchronize operations by harnessing company data, catalyzing actions, and orchestrating workflows within the CRM platform with Data Cloud. Crafting meaningful relationships follows a straightforward formula: seamlessly respond to customer intent and leverage engagement data from web, social, and marketing channels. To maintain a top-of-mind presence, we recognize that consumer goods companies must drive proactive omnichannel communications.

This is where our industry expertise shines, offering prebuilt dashboards for streamlined efficiency, crafting workflows to guide upsell and cross-sell opportunities, automating prospecting, segmenting target audiences, ensuring swift resolution of customer issues, analyzing audience performance, and gaining insights into inventory performance.

Deep Dive: Activating Highly Personalized Experiences with Data Cloud Advanced Segmentation

Maui Jim was an early adaptor of Data Cloud but faced implementation challenges and incorrect source data mapping. They needed advanced segmentation based on user purchase history and product affinity.

Project Highlights:



Enhanced Data Record Synchronization



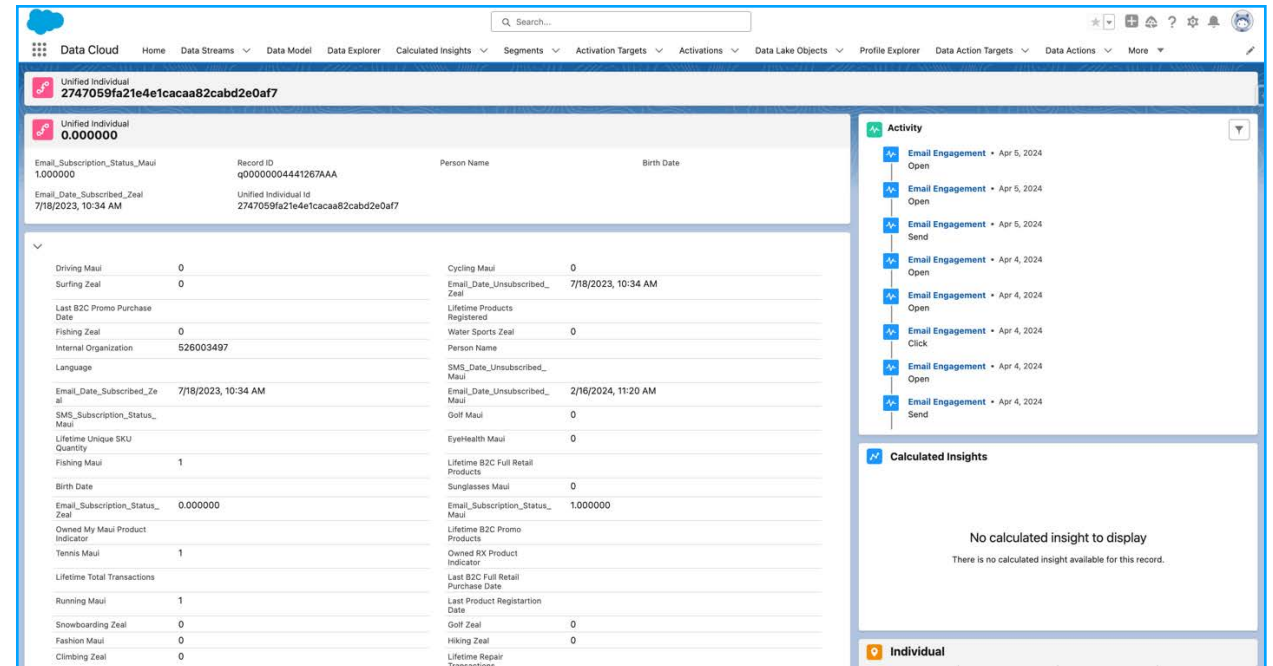
Faster Data-Based Segmentation



Improved Data Model Accuracy & Data Quality

Maui Jim's current processes faced several challenges: data across multiple systems and scaling marketing effectiveness. Due to their growing social customer base, Maui Jim also recognized the need to develop a single view of the customer, encompassing their purchases, activities, and preferences. This initiative allows their team to deliver personalized content seamlessly across all channels, ensuring a cohesive and tailored experience for every customer interaction.

The GyanSys team collaborated closely with the Maui Jim team to rectify discrepancies in subscription counts and statuses. We conducted a thorough analysis and resolved issues stemming from the records synchronization from Marketing Cloud to Data Cloud, which caused errors from their previous implementation project. Our team also assisted Maui Jim in crafting segments tailored to deliver personalized content across various channels at precisely the right moments.



The screenshot displays the Data Cloud interface for a Unified Individual. The main profile section shows the following details:

- Unified Individual ID:** 2747059fa21e4e1caca82cabd2e0af7
- Record ID:** q0000004441267AAA
- Person Name:** (Not explicitly named in the visible fields)
- Birth Date:** 7/18/2023, 10:34 AM
- Internal Organization:** 526003497
- Language:** (Not specified)
- Email_Subscription_Status_Maui:** 1.000000
- Record ID:** q0000004441267AAA
- Person Name:** (Not specified)
- Birth Date:** 7/18/2023, 10:34 AM
- Driving Maui:** 0
- Surfing Zeal:** 0
- Last B2C Promo Purchase Date:** (Not specified)
- Fishing Zeal:** 0
- Internal Organization:** 526003497
- Language:** (Not specified)
- Email_Date_Subscribed_Zeal:** 7/18/2023, 10:34 AM
- SMS_Subscription_Status_Maui:** (Not specified)
- Lifetime Unique SKU Quantity:** (Not specified)
- Fishing Maui:** 1
- Birth Date:** 7/18/2023, 10:34 AM
- Email_Subscription_Status_Zeal:** 0.000000
- Owned My Maui Product Indicator:** (Not specified)
- Tennis Maui:** 1
- Lifetime Total Transactions:** (Not specified)
- Running Maui:** 1
- Snowboarding Zeal:** 0
- Fashion Maui:** 0
- Climbing Zeal:** 0
- Cycling Maui:** 0
- Email_Date_Unsubscribed_Zeal:** 7/18/2023, 10:34 AM
- Lifetime Products Registered:** (Not specified)
- Water Sports Zeal:** 0
- Person Name:** (Not specified)
- SMS_Date_Unsubscribed_Maui:** (Not specified)
- Email_Date_Unsubscribed_Maui:** 2/16/2024, 11:20 AM
- Golf Maui:** 0
- EyeHealth Maui:** 0
- Lifetime B2C Full Retail Products:** (Not specified)
- Sunglasses Maui:** 0
- Email_Subscription_Status_Maui:** 1.000000
- Lifetime B2C Promo Products:** (Not specified)
- Owned B2C Product Indicator:** (Not specified)
- Last B2C Full Retail Purchase Date:** (Not specified)
- Last Product Registration Date:** (Not specified)
- Golf Zeal:** 0
- Hiking Zeal:** 0
- Lifetime Repair Transactions:** (Not specified)

The right-hand sidebar shows an **Activity** log with several "Email Engagement" events, including "Open" and "Send" actions, dated from April 4, 2024, to April 5, 2024. Below the activity log is a **Calculated Insights** section, which currently displays "No calculated insight to display" with the note "There is no calculated insight available for this record."



Name	Activation DataSpace	Segment	Activation Target	Activation Status
1 Individual	default	Individual	Maui Jim	Active
2 AV_GY_Made Purchase in Jan-2023 on Cat Eye	default	GY_Made Purchase in Jan-2023 on Cat Eye	Maui Jim	Active
3 AV_GY_Made Purchase in Jan-2023 on Fashion	default	GY_Made Purchase in Jan-2023 on Fashion	Maui Jim	Active
4 AV_GY_Made Purchase in Jan-2023 on Classic	default	GY_Made Purchase in Jan-2023 on Classic	Maui Jim	Active
5 AV_GY_Made Purchase in Jan-2023 on Shield	default	GY_Made Purchase in Jan-2023 on Shield	Maui Jim	Active
6 AV_GY_Made Purchase in Jan-2023 on Cylindrical	default	GY_Made Purchase in Jan-2023 on Cylindrical	Maui Jim	Active
7 AV_GY_Made Purchase in Jan-2023 on Rimless	default	GY_Made Purchase in Jan-2023 on Rimless	Maui Jim	Active
8 AV_GY_Made Purchase in Jan-2023 on Wrap	default	GY_Made Purchase in Jan-2023 on Wrap	Maui Jim	Active
9 AV_GY_Made Purchase in Jan-2023 on Spherical	default	GY_Made Purchase in Jan-2023 on Spherical	Maui Jim	Active
10 AV_GY_Made Purchase in Jan-2023 on Aviator	default	GY_Made Purchase in Jan-2023 on Aviator	Maui Jim	Active
11 Purchase Last Year Same Month - Cat Eye	default	Made purchase Cat Eye - Same month LY	Maui Jim	Active
12 Made Return LY	default	Made Return LY	Maui Jim	Active
13 GY_Purchase 2+ of same category- Cat Eye	default	Purchase 2+ of same category- Cat Eye	Maui Jim	Active
14 GY Maui Jim subscriber's Based on location	default	GY_Maui Jim subscriber's Based on location	Maui Jim	Active
15 Gyansys_Test AVG in USD, Billing Type Invoice	default			
16 Location	default			
17 GY_Purchase 2+ of same category- Aviator	default			
18 GY_Purchase 2+ of same category- Cylindrical	default			

Data Cloud

Data Lake Objects
Home
Data Streams
Data Model
Data Explorer
Calculated Insights
Segments
Activation Targets
Activations
Data Lake Objects
Profile Explorer
Data Action Targets
Data Actions
More

SFMC Subscriber 526003497 Mappings

Search Data Lake Objects...

Data Space default

Close Save & Close Save

SFMC Subscriber 526003497

Search Fields...

Is Mapped (4)

- A₃ Affiliated To
- A₃ Party Identification ID
- A₃ Party Identification Name
- A₃ Party Identification Type
- A₃ Status
- A₃ Subscriber ID
- A₃ *Subscriber Key Primary Key

Data Model entities

Search Fields...

Individual

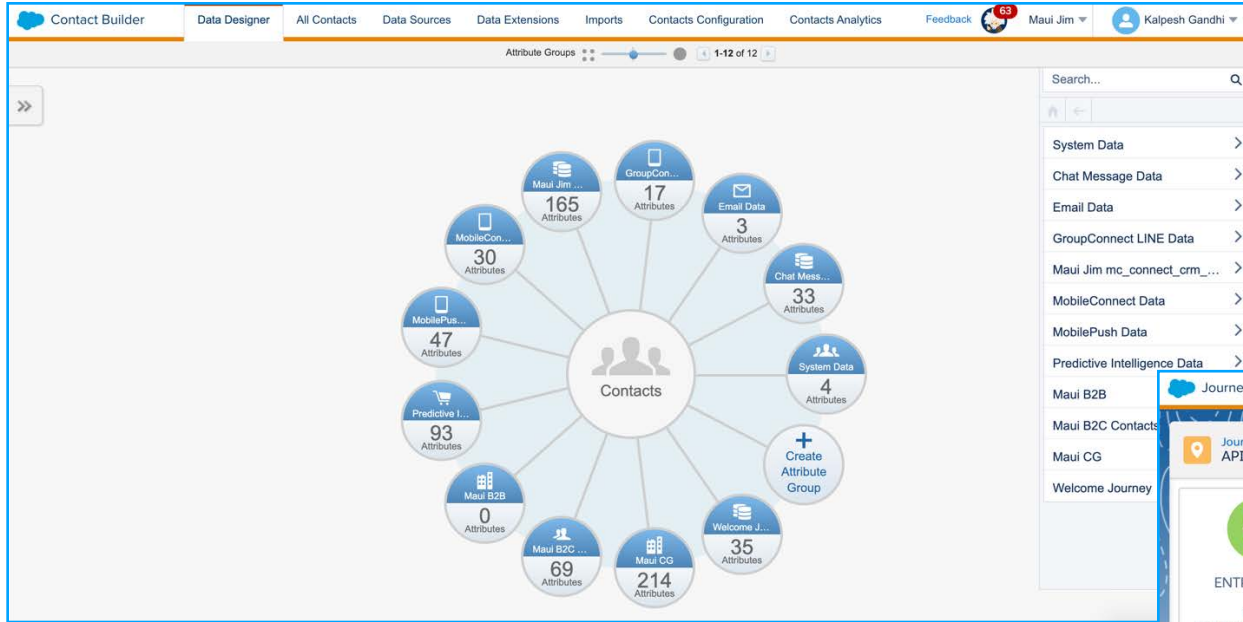
Is Mapped (1)

- A₃ *Individual Id Primary Key

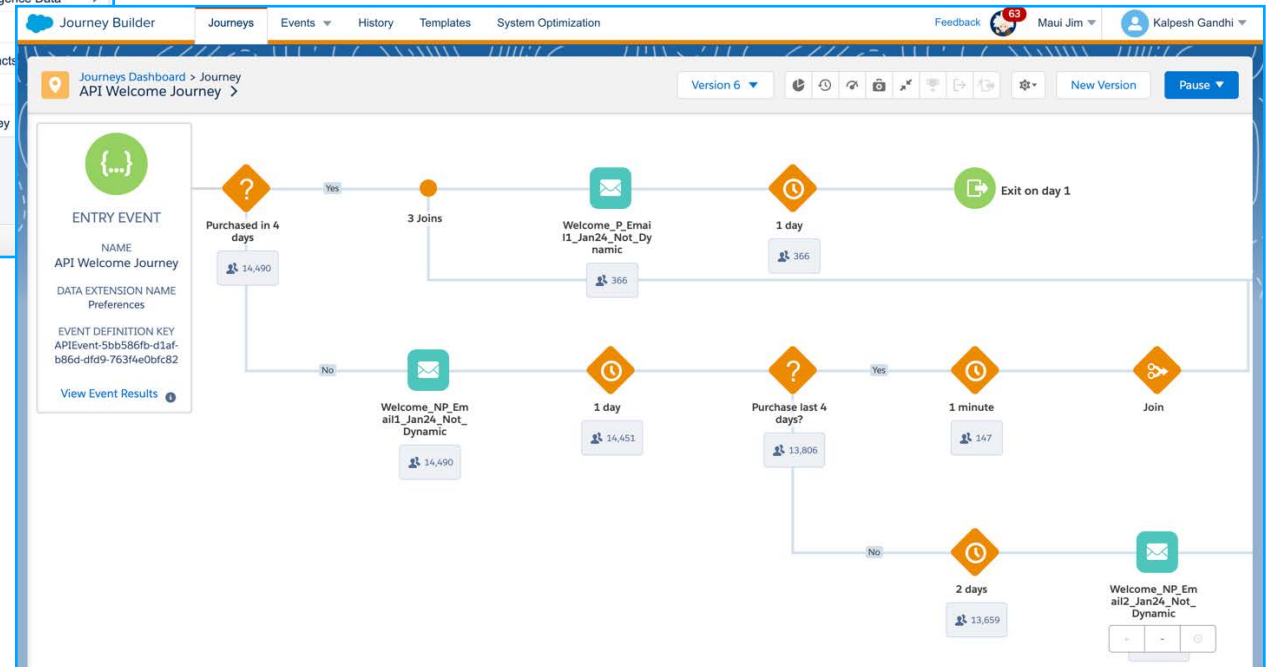
Party Identification

Is Mapped (5)

- A₃ Identification Name
- A₃ Identification Number
- A₃ Party
- A₃ *Party Identification Id Primary Key
- A₃ Party Identification Type



Maui Jim leverages Marketing Cloud to send promotional product emails and recommend products based on user affinity. Marketing Cloud captures preferences from users, which are sent to Data Cloud for unification and advanced segmentation.





Marketing Cloud

In today's fast-paced, always-on omnichannel sales landscape, customers crave authentic, meaningful, and personalized interactions. With increasing competition, marketers face a myriad of challenges. Consumer goods companies rely on various tools to enhance their marketing efforts. While these tools enable businesses to engage effectively with each customer, they can also lead to technical debt that demands extensive customization or even a complete overhaul.

At GyanSys, we ensure that Marketing Cloud solutions are tailored to your business needs, equipped with robust features, and scalable for sustainable growth. Our expertise ensures seamless integration with third-party platforms, streamlined campaign automation, and real-time insights derived from advanced data analytics.

Read our additional resources:

**Marketing Cloud
White Paper**

Deep Dive: Crafting Hyper-Targeted Marketing Campaigns

Frustrated with the internal knowledge and capability gaps, Shaklee needed to complete a full staff augmentation to manage and improve their use of Marketing Cloud.

Project Highlights:



Faster Data-Based Decision Making

3x

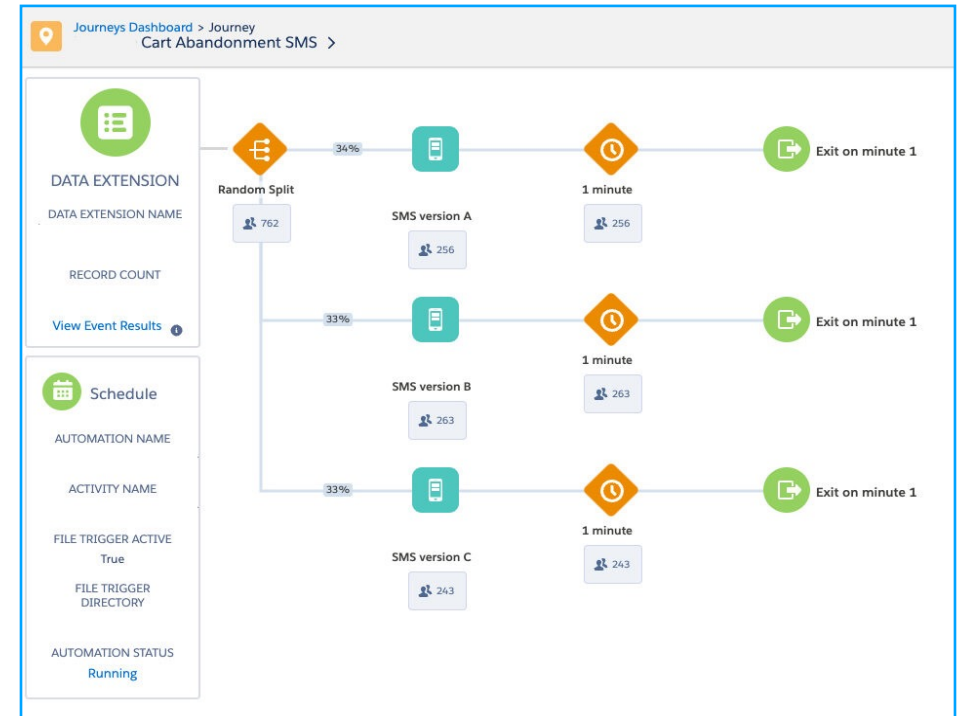
Increase in Customer Engagement

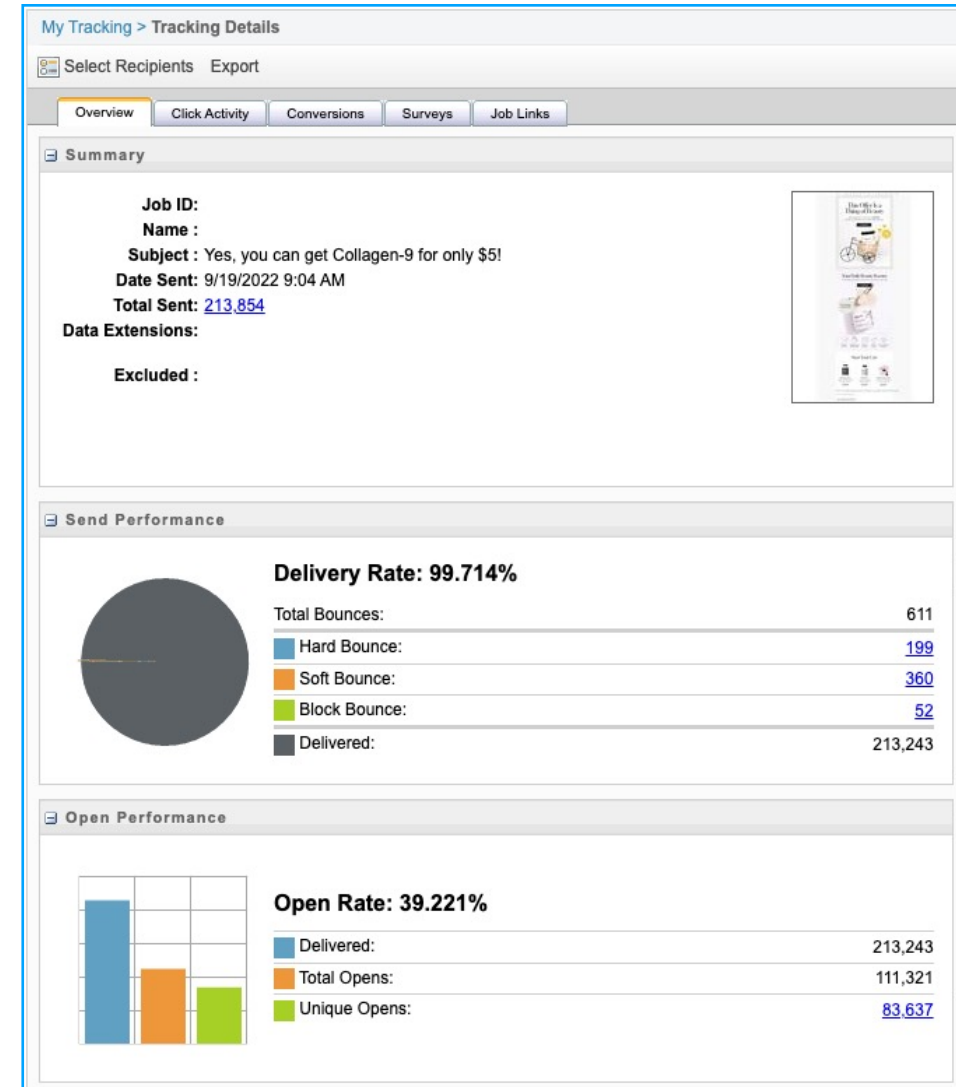
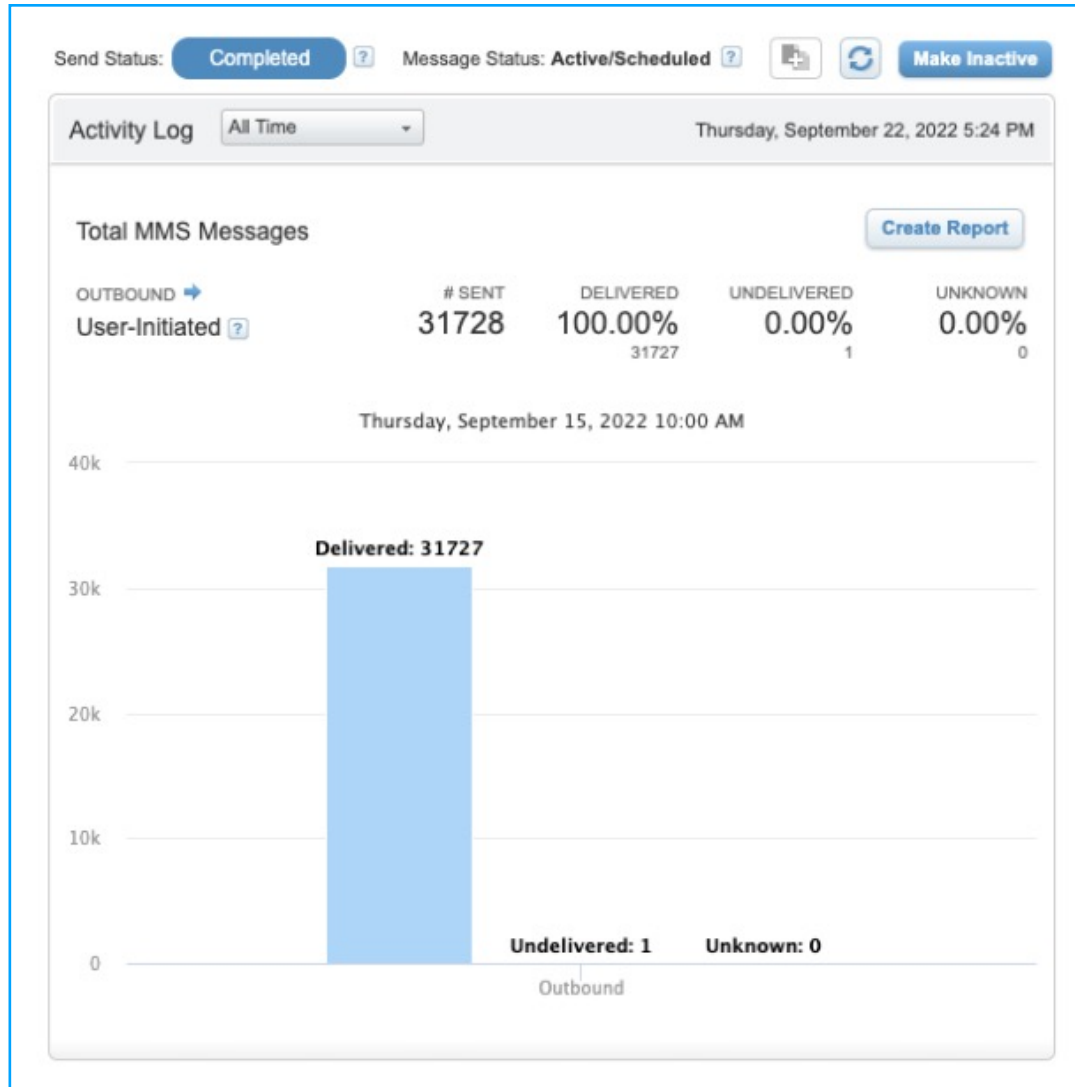


Improved Campaign Tracking

By utilizing hyper-segmentation, Shaklee got granular with their data, built rich subscriber profiles and effectively targeted audiences weekly. Tasked with creating target audiences for broadcast campaigns and sending abandoned cart SMS messages, they seamlessly integrated data from an external system to enhance their outreach strategies. Shaklee also aimed to monitor subscriber counts within its data extension inventory to enhance data visibility and identify any irregularities.

They focused on updating and maintaining automations to align with evolving business requirements and ensure optimal performance. With the help of GyanSys expert team, using SQL queries has allowed for additional flexibility and adaptability to ever-changing customer needs. Shaklee is now able to trigger SMS messages at the same time as their email and web campaigns, personalize email and SMS messages to subscribers and gain greater visibility into their data with the automations with the implementation of Marketing Cloud Email Studio, Mobile Studio, Journey Builder, and Contact Builder. Additionally, it is now simpler to retrieve a true daily or weekly list of subscribers who have made a purchase, and to create additional campaigns growing brand loyalty and engagement. This entails leveraging micro-moments such as browsing behaviors and purchase history to craft highly personalized messages, while also adapting customer journeys weekly. What's more, they can utilize automated reports to stay prepared for evolving trends.







Service Cloud

GyanSys helps simplify agent workflows and processes with Service Cloud Omni-Channel and Digital Engagement to ensure their agents put the customer at the center of every conversation. By delivering all the context necessary within one platform, customer cases are handled faster than ever. Consumer goods organizations can provide proactive service with automated case deflection processes and get ahead of customer and distributor issues.



Deep Dive: Future-Proofing Case Management & Digital Engagement with Service Cloud Voice

Nice & Bella, a luxury goods and jewelry retailer, wanted a scalable, integrated platform to better service and handle cases for their Distributors and customers.

Project Highlights:



Case Management Automation



Reduced Overhead

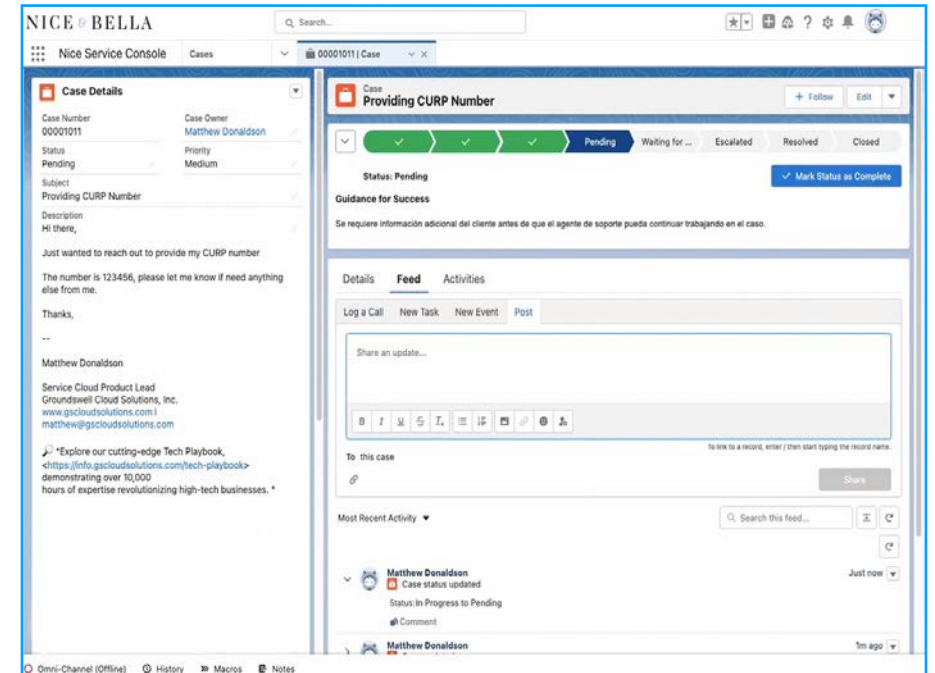


Enhanced Omni-Channel Engagement

The Nice & Bella team had their own legacy system and different tools that were not centralized. They partnered with GyanSys to complete a greenfield implementation of Service Cloud to achieve case record automation and activity tracking. The GyanSys team connected multiple customer service channels into Salesforce, including website live chat, phone through Service Cloud Voice, messaging channels (such as SMS and Facebook) by using Digital Engagement.

The biggest challenge for the Nice & Bella customer service team was to manage and keep track of all inquiries in one place. Service Cloud Service Console equipped the team to fully handle interactions with Distributors and Customers, as well as track the status of cases, assign tasks, and collaborate with other team members to resolve issues quickly based on availability, or workload. GyanSys implemented several features to ensure the success of the project - Case Management, Omni-Channel and Omni-Channel Routing, and Email-To-Case.

The new Salesforce platform now enables the automatic creation of cases, and the ability to auto-populate case fields when a customer sends messages to the Nice & Bella support email addresses. We also eliminated repetitive tasks that Customer Service agents perform on a regular basis and also streamlined case routing based on assignment rules defined by Nice & Bella to provide a faster and more efficient service to customers.



NICE & BELLA

Search...

Nice Service Console Cases 00001935 | Case VC-0000339

Contact Details

Link a related record.

Search contacts...

Messaging Sessions (0)

Knowledge

Search Knowledge...

Suggested Articles

1 Result

Trips and Incentives
000001007 · En Progreso · Last Published Aug 2, 2023, 1:24 PM

Case Notes

Notes (0)

Contact Notes

Attachments (0)

Upload Files

Or drop files

Case 00001935 + Follow Accept

Contact Name	Status	Subject	Date/Time Opened
	New	this is a web to case test	8/16/2023, 3:26 PM

New Open In Progress Pending Waiting for Cu... Escalated Closed

Status: New Mark Status as Complete

Details Activities Case History

Case Details

Case Owner	Customer Care English	Status	New
Case Number	00001935	Related Case	
Contact Name		Case Origin	Web to Case US English
DIN		Priority	
Contact Phone		Classification	Incentives
Contact Email		Category	
Preferred Language	English	Sub-Category	
		Is Private	<input type="checkbox"/>
		No auto-closed	<input type="checkbox"/>

System Information

Date/Time Opened	8/16/2023, 3:26 PM	Date/Time Closed	
Created By	Matthew Davidov, 8/16/2023, 3:26 PM	Last Modified By	Matthew Davidov, 8/16/2023, 3:26 PM

Description and Comments

Chatter Feed Omni-Channel (Online) History Macros Notes

NICE & BELLA

Search...

Nice Service Console Cases Omni Supervisor MS-0000240

Hi

Conversation Details

17782514062 - 16:33:44

Podría proporcionar su DIN?

17782514062 - 16:33:53

4444

En pocas palabras, ¿puede decirme el motivo por el que se está acercando a la asistencia hoy?

Test

17782514062 - 16:34:02

Muy bien, gracias por la información, ¡tratemos de transferirte a un agente!

End Chat

Type a message...

Messaging User

Messaging User Name	+17782514062	Message Type	Text
Messaging Platform Key	+17782514062	Messaging Consent Status	Implicitly Opted In

Contact Information

Name	JUAN GOMEZ ACOSTA	DIN	4444
Customer Type		Rango	
Date Entered		Rango Venta	
Contract Date		Status	
Mobile		Phone	7782514062
Email			

Case Details

Case Number	00001246	Case Owner	Customer Care Español
Status	New	Priority	Medium
Subject	Solicitud SMS		



Sales Cloud

Consumer goods organizations often face challenges in maximizing sales representative productivity, extracting valuable insights throughout the sales cycle, and automating processes. A significant contributing factor is the absence of a defined workflow for managing activity data related to leads, contacts, accounts, and opportunities in a centralized location. To achieve successful sales operations, consumer goods companies must prioritize generating accurate forecasts in real-time and drive growth to ensure that employees can easily access information, track and compare targets, and minimize time spent on low-value tasks.

At GyanSys, we equip consumer goods organizations with the tools they need to streamline the management of various aspects of their operations. Leveraging our industry best practices, you can optimize your operations, boost productivity, and enhance efficiency to seamlessly align with your goals.

Deep Dive: Customer Service Automation with Salesforce Platform

Crocs and HEYDUDE needed to manage their day-to-day workflows within a centralized system.

Project Highlights:



**Enhanced Case
Visibility**



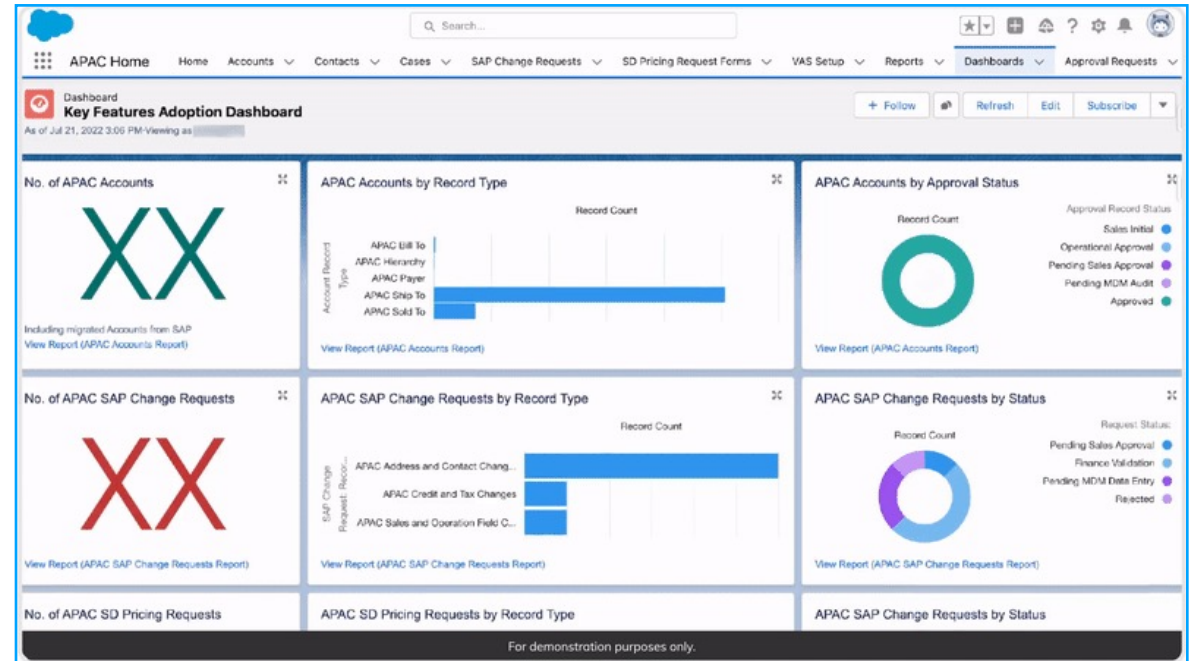
**Increased Task Accuracy
& Response Time**



**Improved Data
Compliance**

The Crocs and HEYDUDE teams needed a more streamlined approval and case resolution process to access the right data at the right time, while also addressing compliance requirements and removing human error from the equation. They also wanted to achieve accurate visibility of accounts information between teams to help prevent multiple lost email threads.

We enhanced the current system search capabilities with the Global Search feature which now displays Related search results, and if the searched records are available in multiple objects users can click on them to easily view the related records. Additionally, our team implemented an automated workflow to enhance insights into volumes and streamline business processes effectively. This was accomplished by standardizing approval steps and criteria. Submissions from the customer service or sales teams undergo a custom, automated approval pipeline to ensure requests are routed to the appropriate teams for review. This allows for traceability of where the request lies in its lifecycle. The Crocs team now has an accurate visibility of accounts information between teams that helps prevent multiple lost email threads with requests and data.



The screenshot shows a web application interface for account management. At the top, there is a navigation bar with a search box and menu items: APAC Home, Home, Accounts (selected), Contacts, Cases, SAP Change Requests, SD Pricing Request Forms, and VAS Setup. Below the navigation bar, the account name 'VAI NEW APPROVERS TEST' is displayed with a grid icon and a user icon. The 'Crocs Account Status' is shown as 'Lead'. A process flow bar contains steps: Open (highlighted), Sales Initial, Legal, Operational Appro..., Pending Sales App..., Finance Validation, and Finance A. Below this, there are tabs for 'Details' (selected) and 'Related'. The 'Details' section is expanded to show 'Account Status' with the following information:

Approval Record Status	Open	Crocs Account Status	Lead
Account Record Type	APAC Sold To	Account ID	0016300001Ga6QU



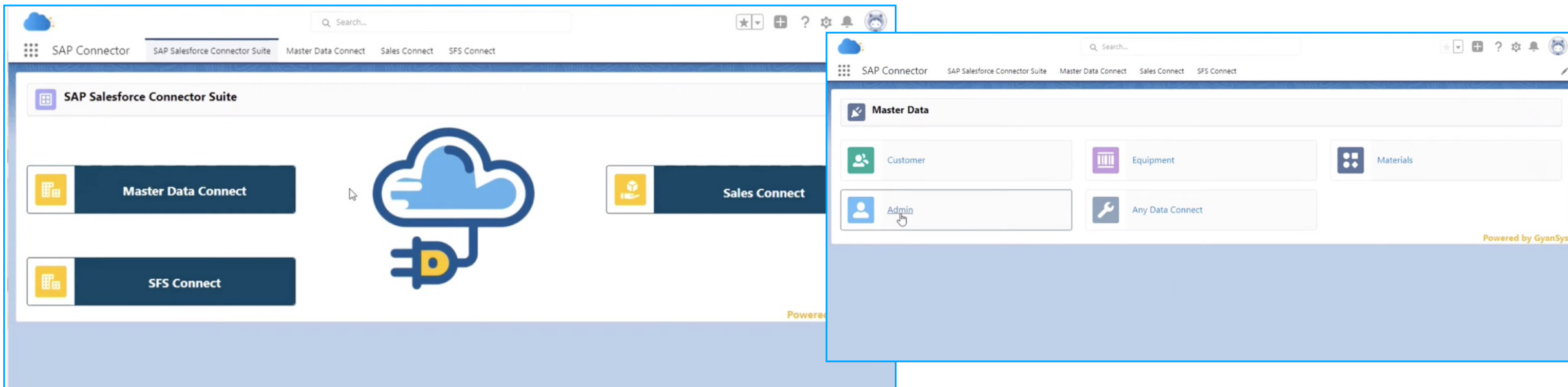
Accelerators for Consumer Goods



Salesforce - SAP Connector

Our Salesforce-SAP Connector is a versatile accelerator that provides complex ERP data integrations and supports full and delta loads with a built-in error-logging mechanism. Organizations can now view, configure, sync, and integrate their master data stored in their backend SAP S/4HANA or ERP ECC systems natively in Salesforce.

We work with customers to build systems that encourage collaboration across teams, both internally and externally, at key areas where time-sensitive decisions are made. Supported in both classic and Lightning UI, the three modules within the accelerator were designed to synchronize master data, including customer materials, sales data, including quotes, invoices, and orders, and field service data, including inventory, pricing, bill of materials, and work orders. To make it simpler for users, the accelerator offers the option to sync data daily, on a specific date and time of the week, or monthly.





**Let's Work
Together**

A person wearing a tan jacket is holding a tablet computer in a grocery store aisle. The background shows shelves stocked with various products, slightly blurred. The text is overlaid on the image.

Consumer companies have chosen to implement Salesforce and partner with GyanSys to drive value customer engagement and improve data visibility.



Why Work With Us?

We are one of Salesforce's top partners for the Consumer Goods sub-vertical and have strong relationships within the industry. Our collaboration with Salesforce product teams allows us to shape implementations that follow best practices and align with Salesforce's future goals and aspirations. If you're looking for a partner that can help you stay ahead of the competition and push the boundaries of innovation and support for your Salesforce journey, look no further than us.

Implementations completed over the last **12+** years are currently **powering, enabling, and reaching millions** of consumer goods and retail customers all around the world.



About Us

GyanSys is a leading global mid-tier provider of digital transformation solutions and systems integration supporting global enterprise customers. We specialize in solutions implementations, managed services, and data analytics spanning SAP, Salesforce, Microsoft, and other prime enterprise platforms. Using a mature blended delivery model with over 2,000 consultants, we support over 350 enterprise customers across the Americas, Europe, and APAC.

Contact us today to discuss a customized solution for enhancing business visibility, sales forecasting, and customer engagement processes.





GYANSYS

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