Implementing a Smart, Efficient Email Notification Tool for a Fortune 100 Financial Company

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The client is a Fortune 100 cards and payments company with operations across the globe. They were highly reliant on their team of Salesforce developers, and wanted an easier way to create and update content for automated email notifications. They engaged Syntel to help set up a new tool with a user-friendly interface that would enable business users to easily create email rules for their Salesforce campaigns.

BUSINESS GOALS

- Automated tool to send emails based on Lead Management Tool campaign codes
- Enable self-service and reduce reliance on technical teams
- Filter choices based on business rules
- Employ reusable components for faster email set up and activation
- Easier, more intuitive email campaign search and lookup

CHALLENGES

- Custom email notifications had to be written in Apex Code
- Tech team was burdened with large numbers of code change requests, causing resource capacity planning issues
- Redundant SOQL queries caused errors and ran into Salesforce governor limits

SYNTEL SOLUTION

- Created new custom objects to store email rules
- Developed reusable components using flows as a utility to fetch the characteristics of referrer, lead, and opportunity objects based on record ID
- Reduced lines of Apex Code by 50% and employed process builders and flows

BUSINESS BENEFITS

95% faster setup

- Users can now set-up new email rules in a matter of few clicks, without involving the tech team.
- **More filter choices:** Users are able to quickly filter their campaigns more easily by selecting the correct issuer, email template, or record type.
- **Smart campaign lookups:** Campaigns can be added or removed for every email rule.
- **Easy activation:** Users can activate or de-activate any email rule with a single click.